Dashboard
Printable Help

Version 2023 R2

Last updated Nov 21, 2023

Abstract
This document is a printable version of Dashboard help.

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https://help.genesys.com/latitude/Liquid/Desktop/Copyright_and_Trademark_Information.htm.

Table of Contents

Dashboard Printable Help

Introduction to Dashboard

Dashboard is a tool that allows your organization to create performance dashboards from multiple sources, based on criteria you specify, for more relevant business analytics. Once created, the dashboard provides a customized view into the collections data associated to a Latitude user account based on the user's assigned role. It displays real-time performance metrics so collectors and managers can analyze collection and performance results. You can customize the Dashboard to suit your personal preferences.

Depending on your permission, the tasks you can do in Dashboard include:

- Adding, modifying, configuring, and deleting dashboards

- Adding, modifying, arranging, configuring, and removing dashboard gadgets

- Adding, modifying, and removing data sources

- Assigning data sources to gadgets

Log On to Dashboard

Use the **Enter Your User Name and Password** dialog box to log on to Dashboard. Your assigned permissions determine which options and features in Dashboard are available to you. For more information, see Permissions and Policies in the *Latitude* documentation.

To log on to Dashboard

1. Do one of the following:

- On your desktop, click the shortcut to Dashboard.

- In your browser, if you have a bookmark set for Dashboard, click the bookmark.

- In your browser, in the **Address** box, type the URL address for Dashboard and press **Enter**.
- If your organization configured the Welcome Web Page permission in the **Permissions and Policies Editor** to display the Dashboard when logging on to Latitude, log on to Latitude.

    The **Enter Your User Name and Password** dialog box appears.

2. In the **User Name** box, type your Dashboard user name.

3. In the **Password** box, type your Dashboard password. As you type your password, periods display instead of the typed characters.

4. To have the system remember your user name so you don't have to type it each time you log on, select the **Remember me** check box.

5. Click **Logon**. Dashboard appears.
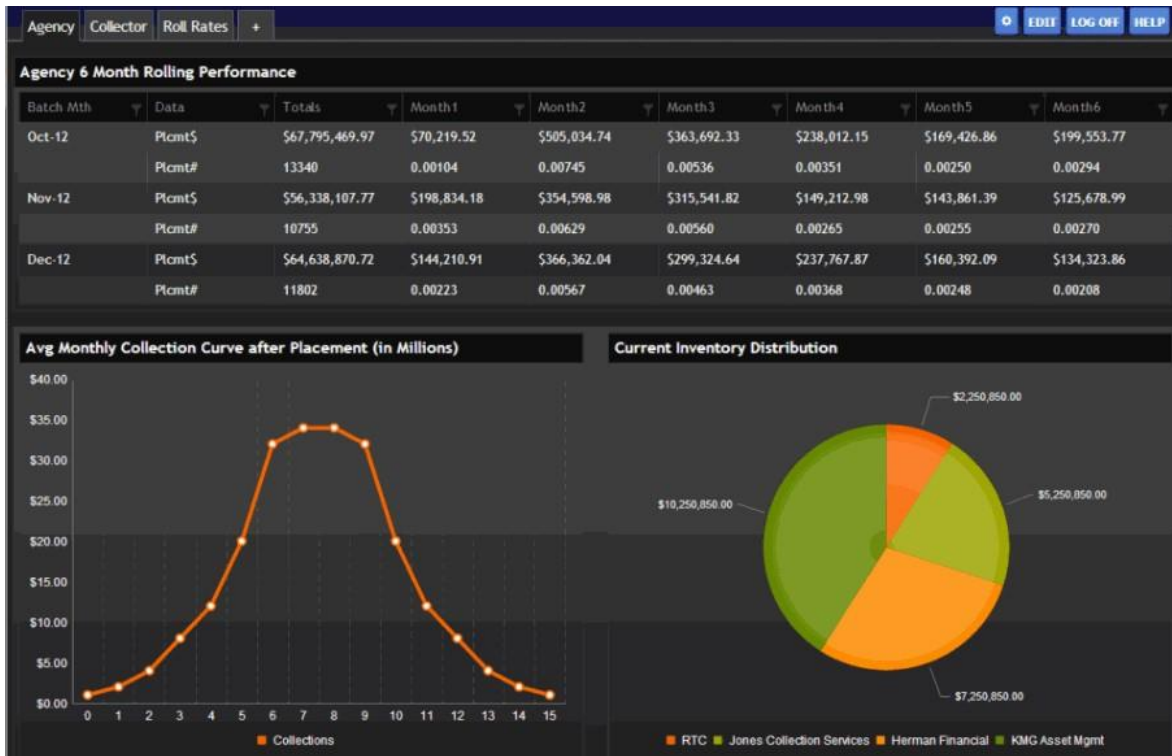
Note: The dashboard that appears is based on the default dashboard defined in the **Permissions and Policies Editor** in Latitude.

Help Overview

Dashboard help provides you with information for using Dashboard. You can click the **Help** link in the **Application** toolbar to display the table of contents. You can locate and view any topic using the table of contents, index, and search features.

To open help

In the Dashboard toolbar, click **Help**. The **Dashboard Help** window appears.

Tip: To adjust the width and height of the window or its panes, click the edge of the window or pane and drag it up or down, left or right.

1. **Toolbar:** Allows you to display the table of contents, index, or search feature. When you click an option in the toolbar, the corresponding information appears in the **Navigation** pane.

2. **Navigation pane:** Displays the following:

    Contents: Displays the table of contents. To display a topic in the **Content** pane, expand a book and then click the link.

    Index: Displays the index. To display a topic in the **Content** pane, type a keyword or phrase in the box (or scroll through the list) and then click the link in the list.

    Search: Displays the search feature. To display a topic in the **Content** pane, type a keyword or phrase in the box and then press **Enter**. In the search results, click the link.

    Glossary: If available, displays a list of terms and their definitions. To display a definition, click the term.

3. **Breadcrumbs:** Displays your current location within the help system. When you click a breadcrumb, the related topic displays.

4. **Content toolbar:** Displays an option to send feedback through an email message to Latitude by Genesys Documentation.

5. **Content pane:** Displays the contents of a topic. To display recently visited topics, use your browser's **Back** and **Forward** options. To view the **Content** pane menu, right-click in the **Content** pane.

Search feature

You can use the search feature to search for topics that contain words or phrases that you specify. You formulate a search query following a specific <u>set of rules</u>. You can include <u>wildcard expressions</u>, <u>Boolean operators</u>, and <u>nested expressions</u> in your search query. A list of topics that match your search criteria appear in the search results. When you click a topic title in the search results, the content of that topic appears in the **Content** pane.

Search syntax

The basic rules for formulating search queries are:

- Searches are not case-sensitive, meaning you can type uppercase or lowercase characters.

- You cannot search for a single character or the following reserved words: an, and, as, at, be, but, by, do, for, from, have, he, in, it, not, of, on, or, she, that, the, there, they, this, to, we, which, with, you.

- The search engine ignores punctuation marks and special characters such as @#$%^&()=+[]\.

- Enclose phrases and terms that include a period (such as a file name with an extension) in double quotation marks.

Wildcard expressions

Wildcard expressions allow you to search for one or more characters using a question mark or asterisk. A question mark represents a single character, while an asterisk represents one or more characters.

Search for...	Example	Result
Topics with text that starts with one or more specified characters and ends in any character or number of characters	log or log*	Returns all topics with text that starts with the specified characters (for example, log, logon, logging.)
Topics with text that starts with the specified characters, has a single character that can be anything, and ends in the specified characters	32?57	Returns all topics with text that has any character where you placed a question mark (for example, 32?57 returns 32257, 32457, and 32857.)
Topics that contain all the words specified, in any order or placement within the topic	account status	Returns all topics with both account and status, but not necessarily as a phrase or in the order specified. For example, the search returns topics with "the account status..." or "the status of the account..."

| Topics that contain the specified phrase | "account status" | Returns all topics with account status as a phrase. For example, the search returns topics with "the account status..." but not "the status of the account..." |

Boolean operators

Boolean operators (AND, OR, NOT, NEAR) allow you to create a relationship between terms. If you don't specify an operator, the system uses AND by default.

Search for...	Example	Result
AND	account AND status	Returns all topics with both account and status, but not necessarily as a phrase or in the order specified. For example, the search returns topics with "the account status..." or "the status of the account..."
OR	account OR status	Returns all topics with either account or status, or both.
NOT	account NOT status	Returns all topics with account but not status.
NEAR	account NEAR status	Returns all topics where account is within eight words of status.

Nested expressions

Nested expressions allow you to perform complex searches. For example, queue AND ((collector OR clerical) not supervisor) finds topics containing queue and collector but not supervisor, or containing queue and clerical but not supervisor. As with mathematical expressions, the system evaluates expressions in parentheses first. If there is no parenthesis, the system evaluates the expression from left to right. For example, queue NOT (clerical OR supervisor) finds topics containing queue but not clerical or supervisor. Queue NOT clerical OR supervisor finds topics containing queue but not clerical, or topics containing supervisor.

Dashboard View

Dashboard View

A dashboard displays real-time performance metrics so collectors and managers can analyze collection and performance results. Dashboard presents data using bar charts, data grids, line graphs, pie charts, and text boxes.

Bar chart

Highest Delinquency Previous 12 Months vs. Next 12 Months

Data grid

12 Month Rolling Rates

Month	Current Balance	Bucket 1	Rolled to 30	Bucket 2	Rolled to 60	Bucket 3
2012/03	$1,100	$40	4.00%	$15	38.50%	$10
2012/04	$1,000	$39	3.75%	$12	37.25%	$9
2012/05	$1,100	$40	4.00%	$15	38.50%	$10
2012/06	$1,000	$39	3.75%	$12	37.25%	$9
2012/07	$1,100	$40	4.00%	$15	38.50%	$10
2012/08	$1,000	$39	3.75%	$12	37.25%	$9
2012/09	$1,100	$40	4.00%	$15	38.50%	$10
2012/10	$1,000	$39	3.75%	$12	37.25%	$9
2012/11	$1,100	$40	4.00%	$15	38.50%	$10
2012/12	$1,000	$39	3.75%	$12	37.25%	$9
2013/01	$1,100	$40	4.00%	$15	38.50%	$10
2013/02	$1,100	$40	4.00%	$15	38.50%	$10

1   10 ▾ items per page   1 - 10 of 12 items
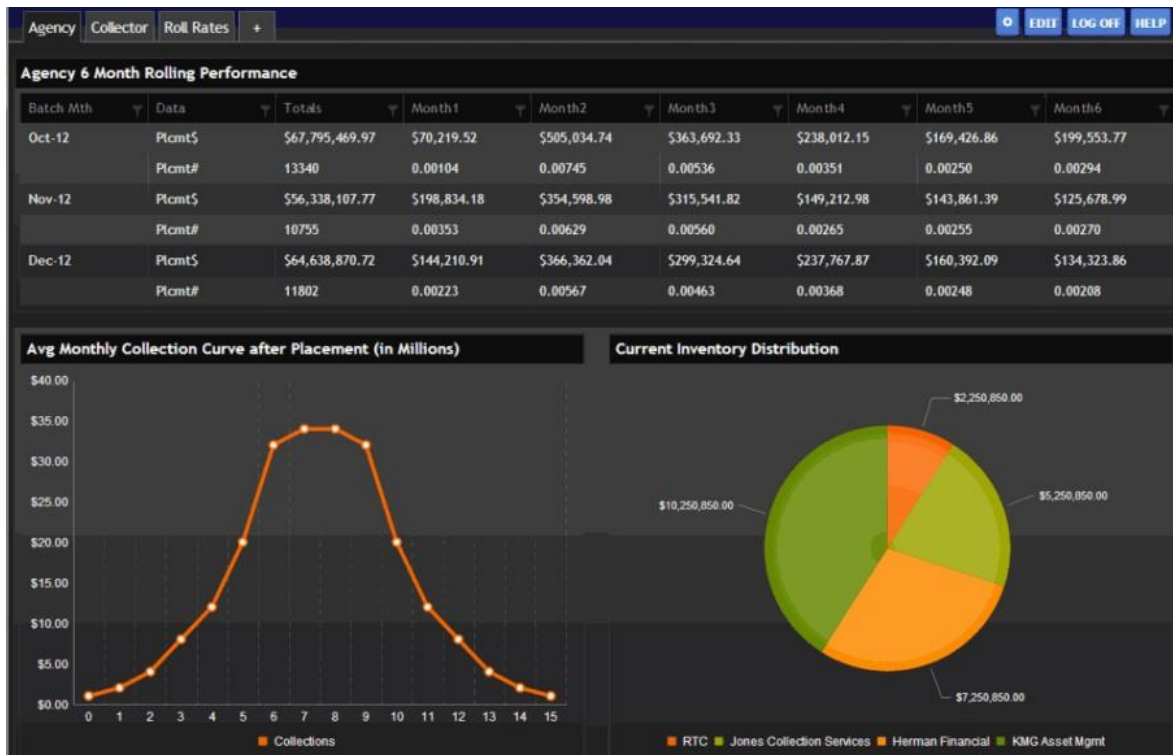
Line graph
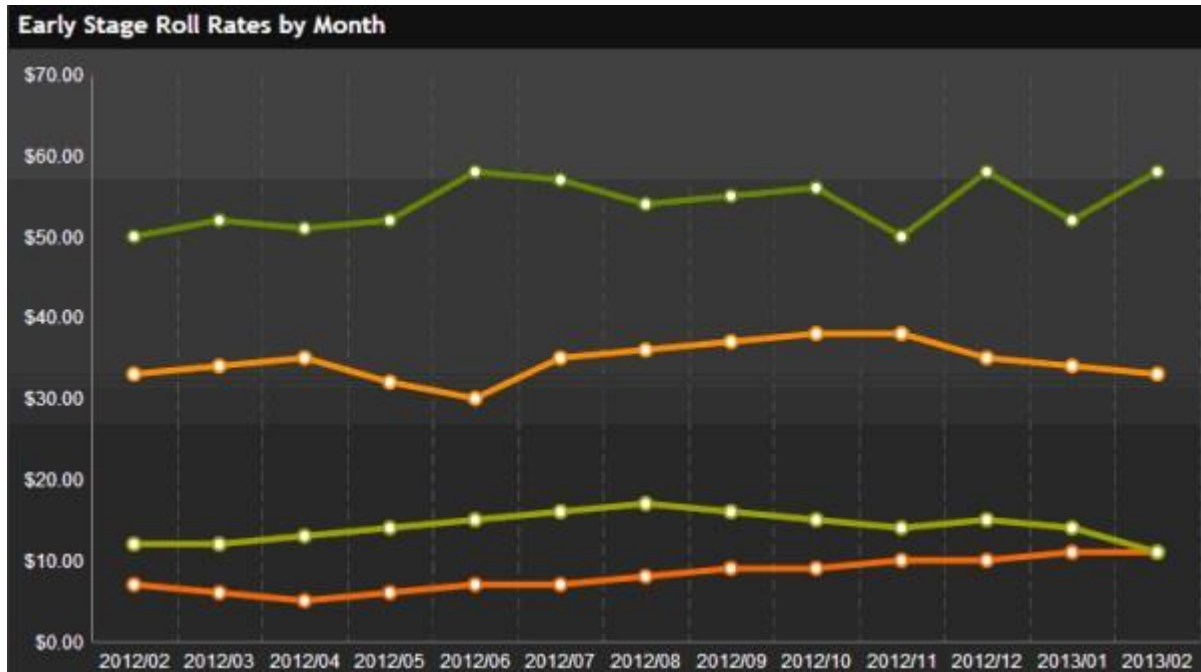
Pie chart
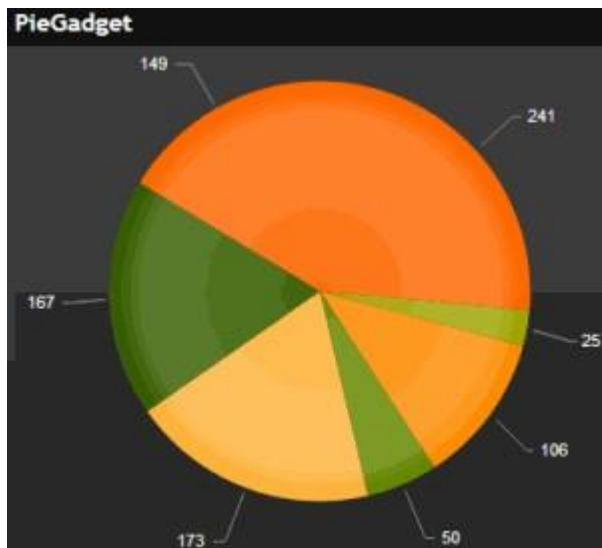
View a Dashboard

Use the tabs in the Dashboard main window to view the dashboards that are available to you. If you have the appropriate permissions, you can create and modify dashboards. For more information, see *Permissions and Policies* in the Latitude documentation.

To view a dashboard

1. In the toolbar, click the tab for the dashboard to display.

2. If the dashboard has a data grid, you may be able to sort, filter, or page through the data.

3. If the dashboard has a pie chart, bar chart, or line graph that you configured to show tooltips, rest your mouse on an area of the chart or graph to view more information.

Specify a Theme for the Dashboard Main Window

Use the **Dashboard Options** dialog box to specify a color theme for the Dashboard main window. **To specify a theme for the dashboard main window**

1. In the toolbar, click the Configuration icon . The **Dashboard Options** dialog box appears.

2. In the **Theme** list box, click a color theme to apply to the dashboard and then click **X**.

Data Grids

Data Grids

A data grid displays information in a table format (rows and columns). If there are no records to display, Dashboard hides the data grid titles and column headings.

Some data grids allow you to:

- Sort the data in the data grid.

- Filter the data in the data grid.

- Page through the data grid.

Sort the Data in a Data Grid

Some data grids allow you to sort the data in the data grid by a single column in ascending or descending order.

To sort data in a data grid

1. Locate the data grid on the Dashboard.

12 Month Rolling Rates						
Month	Current Balance	Bucket 1	Rolled to 30	Bucket 2	Rolled to 60	Bucket 3
2012/03	$1,100	$40	4.00%	$15	38.50%	$10
2012/04	$1,000	$39	3.75%	$12	37.25%	$9
2012/05	$1,100	$40	4.00%	$15	38.50%	$10
2012/06	$1,000	$39	3.75%	$12	37.25%	$9
2012/07	$1,100	$40	4.00%	$15	38.50%	$10
2012/08	$1,000	$39	3.75%	$12	37.25%	$9
2012/09	$1,100	$40	4.00%	$15	38.50%	$10
2012/10	$1,000	$39	3.75%	$12	37.25%	$9
2012/11	$1,100	$40	4.00%	$15	38.50%	$10
2012/12	$1,000	$39	3.75%	$12	37.25%	$9
2013/01	$1,100	$40	4.00%	$15	38.50%	$10
2013/02	$1,100	$40	4.00%	$15	38.50%	$10

10 items per page   1   1 - 10 of 12 items

2. Click a column heading to sort the data grid in ascending order by that column.

3. Click the column heading again to sort the data grid in descending order by that column.

Filter the Data in a Data Grid

Some data grids allow you to limit the data that displays in the data grid based on one or more criteria you specify.

To filter data in a data grid

1. Locate the data grid on the Dashboard.

2. Click the Filter icon ![filter icon] for the column to set limits. A **Filter** dialog box appears.

Operator: Operator to use to compare the selected column to a value.

Value: Value to compare to the selected column.

Boolean: Allows you to create a relationship between values.

The following table describes the operators available for filtering a data grid.

Operator	Description	Example
Is Equal To	Displays records that match the value specified.	Month is equal to "October" only displays records where the month is October.

Operator	Description	Example
Is Not Equal To	Displays records that do not match the value specified.	Month is not equal to "October" only displays records where the month is any month except October.
Starts with	Displays records that start with the value specified.	Month starts with "J" only displays records for months that start with the letter J.
Contains	Displays records that contain the value specified.	Month contains "ber" only displays records where the month contains the letters "ber" in that order.
Does not Contain	Displays records that do not contain the value specified.	Month contains "ber" only displays records where the month does not contain the letters "ber" in that order.
Ends with	Displays records that end with the value specified.	Month ends with "Y" only displays records for months that end with the letter Y.
And	Displays records that match both values specified.	Month starts with "J" and month ends with "Y" only displays records for months that start with the letter J and end with the letter Y.
Or	Displays records that match either one of the values specified.	Month is equal to "October" or month is equal to "November" only displays records where the month is October or November.

3.   In the **Operator** list box, click the operator.

4.   In the **Value** box, type the value to compare.

5.   To specify a second expression to evaluate, in the **Boolean** list box, click the Boolean operator and then specify the **Operator** and **Value**.

6.   Click **Filter**. Dashboard updates the data grid to reflect the filter criteria. Dashboard only displays the records that meet the specified criteria.

Tip: To remove a filter, click **Clear**.

Page Through a Data Grid

Some data grids allow you to page through the data grid when the number of records exceeds the maximum allowed to display on a page.

To page through a data grid

1. Locate the data grid on the Dashboard.

2. To display a different page, do one of the following:

3. Click a page number to display that page of the data grid.

4. Click one of the following icons:

Icon	Description
	Displays the first page of the data grid.
	Displays the previous page of the data grid.
	Displays the next page of the data grid.
	Displays the last page of the data grid.

5. To change the maximum number of records that display on a page, click the **Items per page** list box and then click a number.

6. To refresh the data grid, click the Refresh icon.

# Dashboard Setup

Dashboard Setup

If you have the appropriate permissions, you can create and modify one or more dashboards to display information according to your preference. Each dashboard appears on a separate tab within the Dashboard main window. For more information about permissions, see *Permissions and Policies* in the Latitude documentation.

Add a Dashboard

You can add a dashboard to appear as a tab in the Dashboard main window. You specify the dashboard's name, the number of columns to display, which gadgets to display and where, the appearance of the gadgets, and what data source each gadget uses.

To add a dashboard

1. In the toolbar, click the plus sign (**+**) tab. The dashboard displays in add mode.
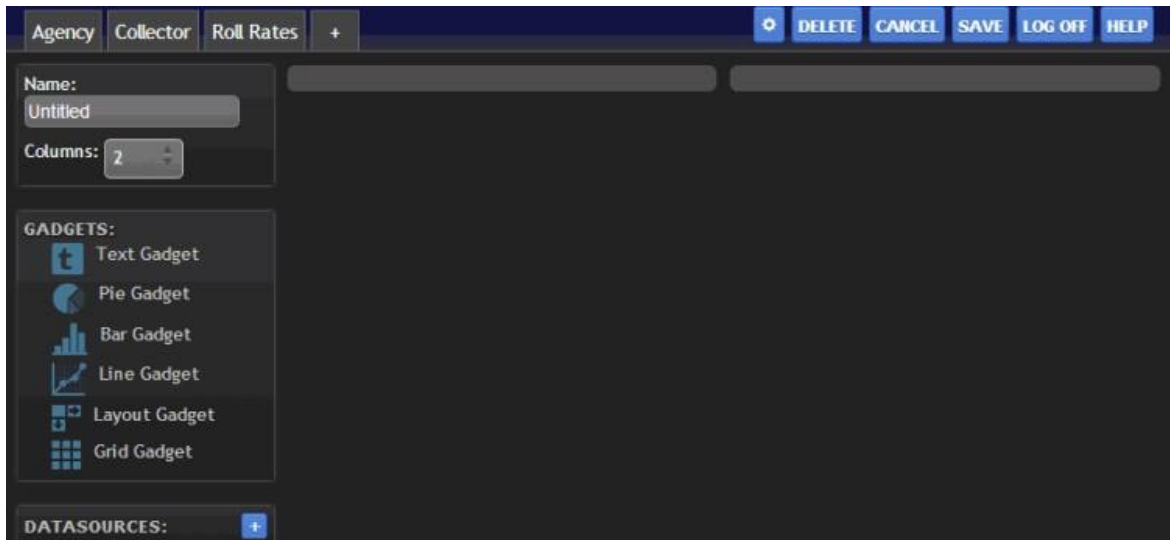

2. In the **Name** box, type a name for the dashboard.

3. In the **Columns** box, type the number of columns to divide the dashboard into or use the arrows to increase or decrease the number. The maximum number of columns allowed is 10.

4. In the **Gadgets** section, click a gadget and drag and drop it to a column on the dashboard.

5. Configure the gadget.

6. Add and configure more gadgets as necessary.

7. In the toolbar, click **Save**.

Modify a Dashboard

You can modify a dashboard according to your preferences. You can change the name, the number of columns, which gadgets display, where the gadgets display, the appearance of the gadgets, and what data source each gadget uses. **To modify a dashboard**

1. In the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard appears in edit mode.
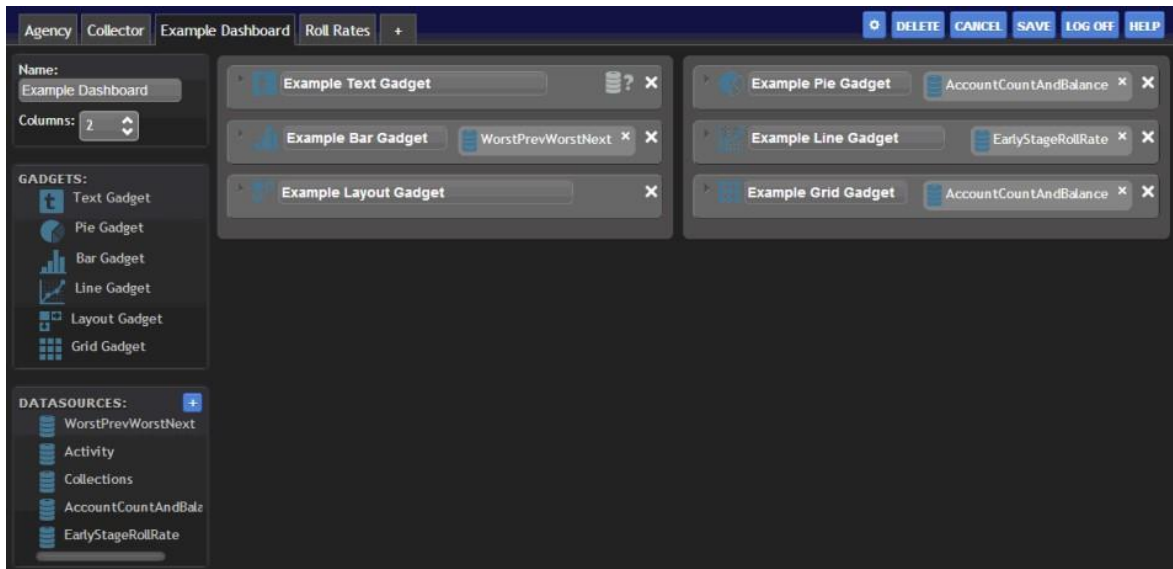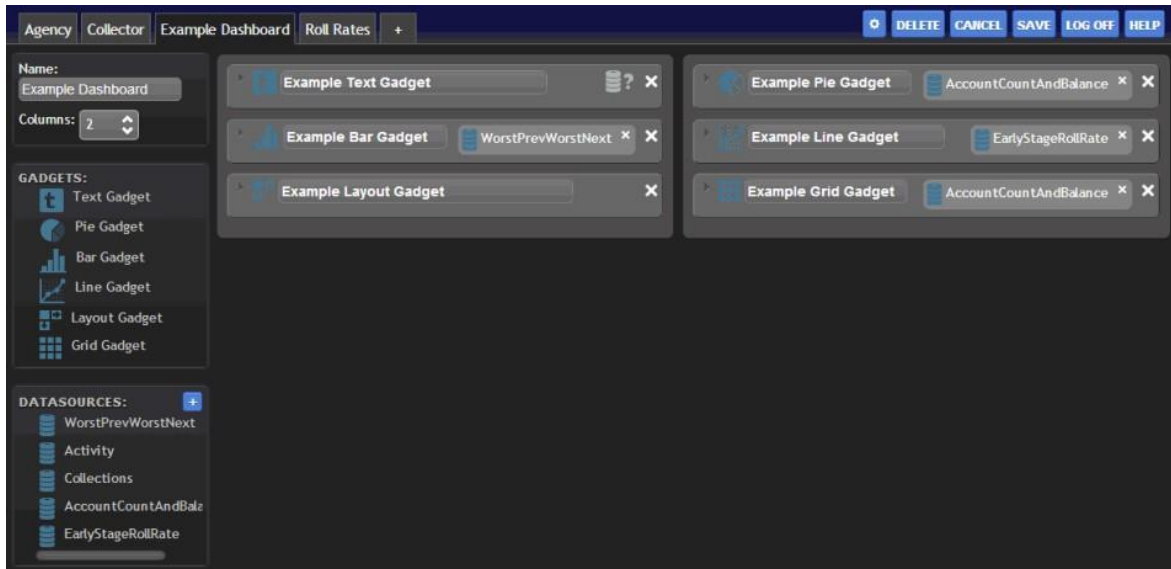

2. Modify the dashboard as necessary and then click **Save**. The dashboard appears in view mode.

Delete a Dashboard

You can delete any dashboard that you created. **To delete a dashboard**

1. In the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard appears in edit mode.

2. In the toolbar, click **Delete**.

Data Sources

Data Sources

Data sources retrieve data from the database specified in the connection string in the Dashboard Web.config file. Once you add a data source to Dashboard, you can associate it to a gadget. A gadget displays the data on a dashboard in the form of a bar chart, data grid, line graph, pie chart, or as text.

Variables syntax

Each data source has a table with columns. To use a specific data source column in a dashboard, use one of the following options:

- **$(Dashboard Name.Source Name.Column Name)** – This format uses the fully qualified name of a column.

- **$(Source Name.Column Name)** – This format assumes that the source name is unique across the dashboards that are open.

- **$(Source Name)** – This format also assumes that the source name is unique across the dashboards that are open. Since the data source omits the column name, Dashboard uses the first column.

Global data sources

There are several data sources stored in memory that aren't in the list of data sources available for use with the variables syntax. The built-in global data sources are:

- **$(UserId)** – Latitude user ID of the logged on user.

- **$(UserContextType)** – User context type associated to the logged on user. This value is either (the string) "Owner", "Branch", "Department", "Team", or "Desk."

- **$(UserDesk)** – Desk associated to the logged on user.

- **$(UserTeam)** – Team associated to the logged on user.

- **$(UserDepartment)** – Department associated to the logged on user.

- **$(UserBranch)** – Branch associated to the logged on user.

For example, to display the user name, you can create a raw SQL data source using the following SQL statement:

SELECT UserName FROM Users WHERE ID = $(UserId)

Note: There is only one column in the UserId data source, so $(UserId), $(UserId.UserId), and $(Global.UserId.UserId) all work, unless you create a data source in your dashboard called UserId.

Raw MDX Data Source

Raw MDX Data Source

The Raw MDX data source allows you to define an MDX query statement to retrieve data from the database specified in the connection string in the Dashboard Web.config file.

Example

```
WITH
MEMBER [Measures].[SumOfAG] AS
'( Sum({[Time]}, [Measures].[RunningTotalSubs]))'

MEMBER [Measures].[SuperSum] AS
' (Sum({[Age Group].[13 and 17],[Age Group].[18 and 24],[Age Group].[25 and 34],[Age Group].[35 and
44],[Age Group].[45 and 54],[Age Group].[over 55],[Age Group].[less than 13],[Age Group].[UNKNOWN]
},[Measures].[SumOfAG] ))'

MEMBER [Measures].[GMale] AS
'( Sum({([Time],[Gender].[Male])}, [Measures].[RunningTotalSubs]))'
MEMBER [Measures].[GMalePer] AS
' ([Measures].[GMale] / [Measures].[SuperSum])'
MEMBER [Measures].[GFemale] AS
'( Sum({([Time],[Gender].[Female])}, [Measures].[RunningTotalSubs]))'

MEMBER [Measures].[GFemalePer] AS
' ([Measures].[GFemale] / [Measures].[SuperSum])'
```

MEMBER [Measures].[GUnknown] AS
'(Sum({([Time],[Gender].[Unknown])}, [Measures].[RunningTotalSubs]))'

MEMBER [Measures].[GUnknownPer] AS
' ([Measures].[GUnknown] / [Measures].[SuperSum])'

select {[Measures].[SumOfAG], [Measures].[GMale], [Measures].[GMalePer], [Measures].[GFemale],
[Measures].[GFemalePer], [Measures].[GUnknown], [Measures].[GUnknownPer] } on
Columns, { ([Age Group].children) } on Rows from [consumers] where ([Zone Id].&[501])
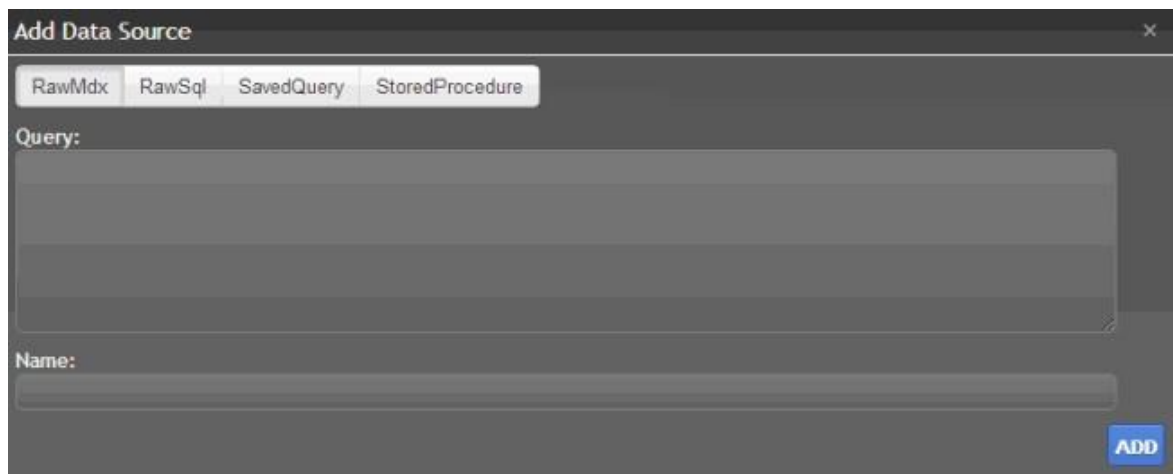
Add a Raw MDX Data Source

Use the **Add Data Source** dialog box to add a Raw MDX data source.

To add a Raw MDX data source

1. Do one of the following:

   • To open an existing dashboard, in the toolbar, click the tab of the dashboard to open and then
     click **Edit**. The dashboard displays in edit mode.

   • To add a dashboard, click the plus sign (**+**) tab. The dashboard displays in add mode.

2. In the **Data Sources** box, click the plus sign (**+**).

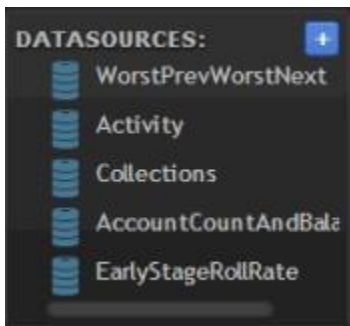   The **Add Data Source** dialog box appears.

3. In the toolbar, click **RawMdx**.

4. In the **Query** box, type the MDX query to use to retrieve data from the database.

5. In the **Name** box, type a name for the Raw MDX data source and then click **Add**. Dashboard adds
   the Raw MDX data source to the **Data Sources** section.

Modify a Raw MDX Data Source

Use the **Edit Data Source** dialog box to modify a Raw MDX data source.

To modify a Raw MDX data source

1. Do one of the following:

- To open an existing dashboard, in the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.

- To add a dashboard, click the plus sign (**+**) tab. The dashboard displays in add mode.

2. In the **Data Sources** box, double-click the data source you set up using raw MDX.

The **Edit Data Source** dialog box appears.
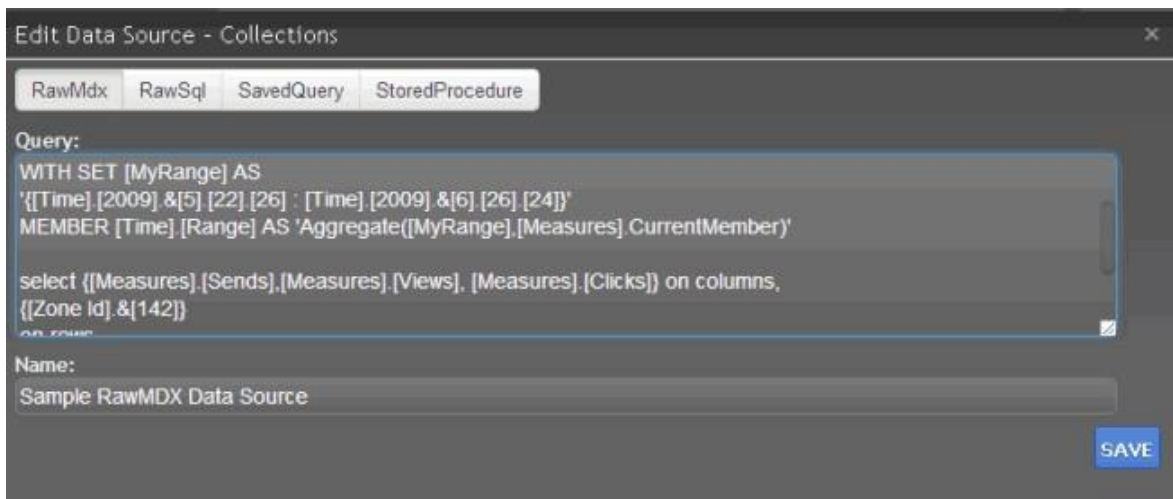
3. Modify the information as necessary and then click **Save**.

Note: To delete the data source, click **Delete**.

Raw SQL Data Source

Raw SQL Data Source

The Raw SQL data source allows you to define a SQL query statement to retrieve data from a database you specify.

Example

SELECT customer_id, customer_name, COUNT(order_id) as total

FROM customers INNER JOIN orders ON customers.customer_id = orders.customer_id GROUP

BY customer_id, Customer_name

HAVING COUNT(order_id) > 5
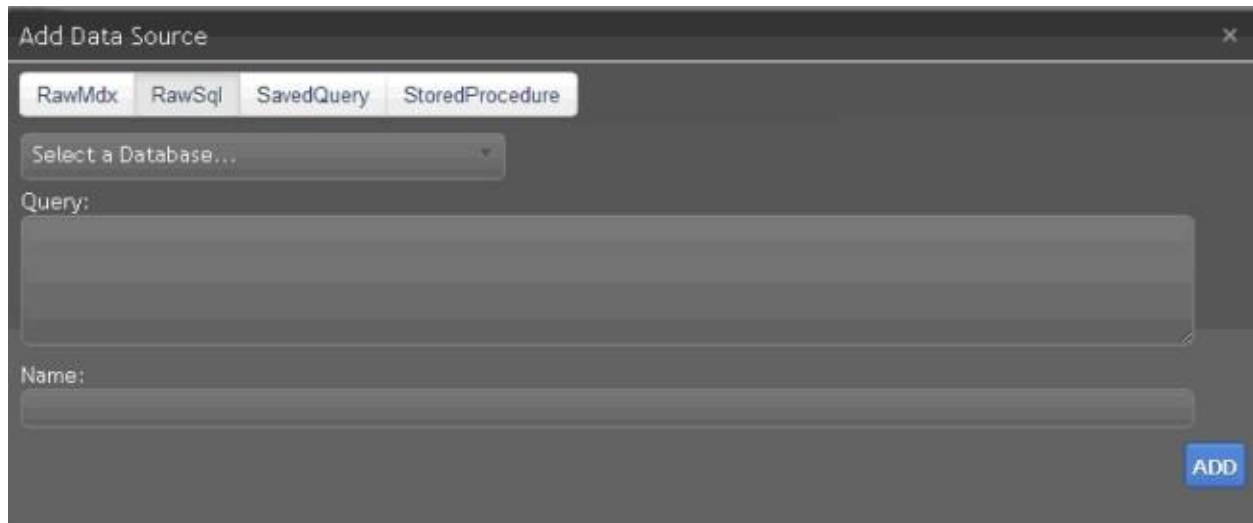
ORDER BY COUNT(order_id) DESC

Add a Raw SQL Data Source

Use the **Add Data Source** dialog box to add a Raw SQL data source.

To add a Raw SQL data source

1. Do one of the following:

2. To open an existing dashboard, in the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.

3. To add a dashboard, click the plus sign (**+**) tab. The dashboard displays in add mode.

2. In the **Data Sources** box, click the plus sign (**+**).

The **Add Data Source** dialog box appears.

3. In the toolbar, click **RawSql**.

4. In the **Select a Database** list box, click the database to query. The "Default" option represents the database specified in the connection string in the Dashboard Web.config file.

5. In the **Query** box, type the SQL query to use to retrieve data from the database.

6. In the **Name** box, type a name for the Raw SQL data source and then click **Add**. Dashboard adds the Raw SQL data source to the **Data Sources** section.

Modify a Raw SQL Data Source

Use the **Edit Data Source** dialog box to modify a Raw SQL data source.

To modify a Raw SQL data source

1. Do one of the following:

   - To open an existing dashboard, in the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.

   - To add a dashboard, click the plus sign (**+**) tab. The dashboard displays in add mode.

2. In the **Data Sources** box, double-click the data source you set up using raw SQL.
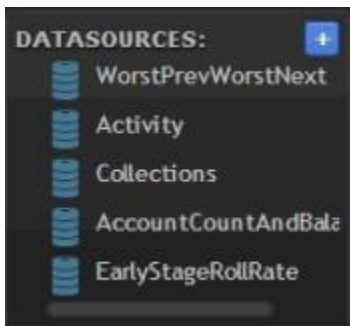
The **Edit Data Source** dialog box appears.
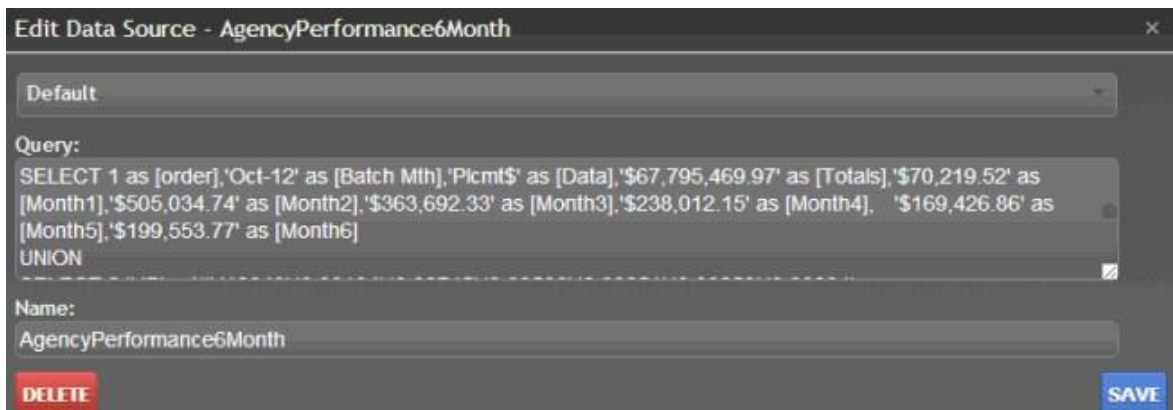
3. Modify the information as necessary and then click **Save**.

> **Note**: To delete the data source, click **Delete**.

Saved Query Data Source

Saved Query Data Source

The Saved Query data source allows you to specify a saved query to retrieve data from a database you specify. Users create and save these queries using the query tools (such as Account Analysis) in Latitude. For more information about creating and saving a query, see *Create a Query* in the Latitude documentation.

Add a Saved Query Data Source

Use the **Add Data Source** dialog box to add a Saved Query data source.

To add a Saved Query data source

1. Do one of the following:

- To open an existing dashboard, in the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.

- To add a dashboard, click the plus sign (**+**) tab. The dashboard displays in add mode.

2. In the **Data Sources** box, click the plus sign (**+**).

The **Add Data Source** dialog box appears.
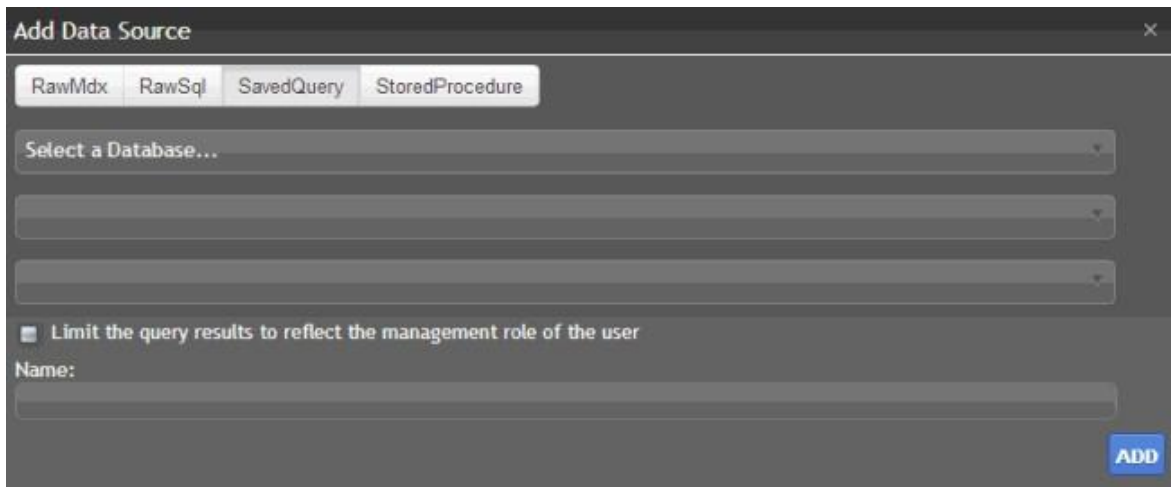
3. In the toolbar, click **SavedQuery**.

4. In the **Select a Database** list box, click the database to query. The "Default" option represents the database specified in the connection string in the Dashboard Web.config file.

5. In the **Select a User** list box, click the user for whom to display saved queries. Dashboard populates the **Select a Saved Query** list box with the queries that the specified user created.

6. In the **Select a Saved Query** list box, click the saved query to use to retrieve data.

7. To limit the query results to reflect the management role of the selected user, select the check box.

8. In the **Name** box, type a name for the data source and then click **Add**. Dashboard adds the Saved Query data source to the **Data Sources** section.

Modify a Saved Query Data Source

Use the **Edit Data Source** dialog box to modify a Saved Query data source.

To modify a Saved Query data source

1. Do one of the following:

- To open an existing dashboard, in the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.

- To add a dashboard, click the plus sign (**+**) tab. The dashboard displays in add mode.

2. In the **Data Sources** box, double-click the data source you set up using a saved query.
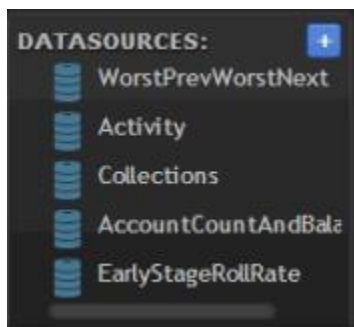
The **Edit Data Source** dialog box appears.
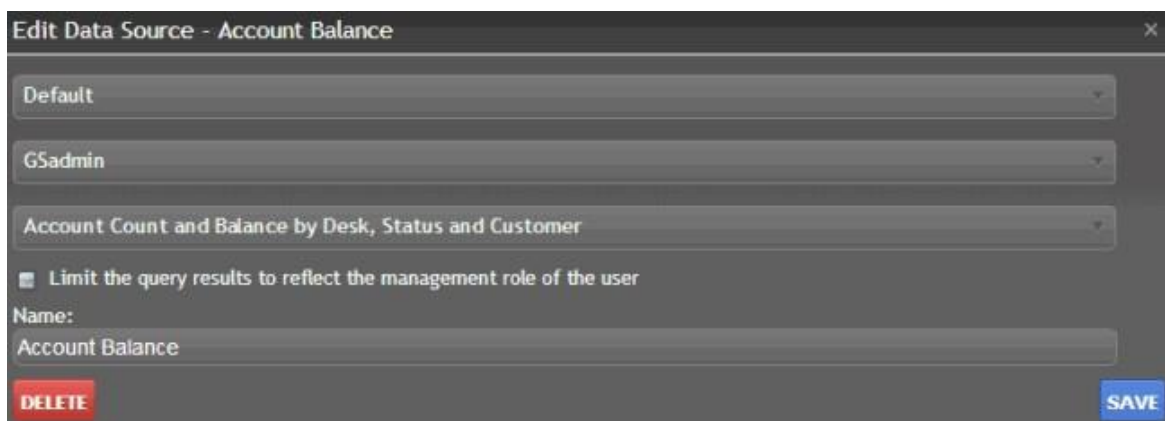
3. Modify the information as necessary and then click **Save**.

Note: To delete the data source, click **Delete**.

Stored Procedure Data Source

Stored Procedure Data Source

The Stored Procedure data source allows you to specify a stored procedure to retrieve data from a database you specify. Only stored procedures that meet one of the following criteria are available:

- The stored procedure accepts no parameters.

- The stored procedure accepts the "@UserContextType" and "@UserContextValue" parameters. If the stored procedure meets the criteria, it passes "@UserContextType" one of the following values, depending on whether the logged on user is an Owner, Branch, Department, Team, or Desk. It passes "@UserContextValue" a value corresponding to the type. For example, if the user is a collector, "@UserContectType" = Desk and "@UserContextValue" = the user's desk code.

If there is more than one value associated with a user context type (for example, the user is the manager of more than one branch,) the value passed to the stored procedure includes all the branch codes separated by "|" characters. The following stored procedure demonstrates this concept:

```
SET ANSI_NULLS ON
GO
SET QUOTED_IDENTIFIER
ON
SET ANSI_NULLS ON
GO
CREATE PROCEDURE [dbo.]
.
[DashboardAllThreeParameters]

  @UserContextType VARCHAR(20),


  @UserContactValue VARCHAR(8000),

    @UserId VARCHAR (80)
AS
BEGIN
   SELECT
        @UserId AS UserId,

              @UserContextType

AS ContextType,              string

AS ContextValue

  FROM [[dbo] . [StringToSet] (
        @UserContextValue
        , '|'

  ) END
```

Add a Stored Procedure Data Source

Use the **Add Data Source** dialog box to add a Stored Procedure data source.

To add a Stored Procedure data source

1. Do one of the following:

- To open an existing dashboard, in the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.

- To add a dashboard, click the plus sign (**+**) tab. The dashboard displays in add mode.

2. In the **Data Sources** box, click the plus sign (**+**).
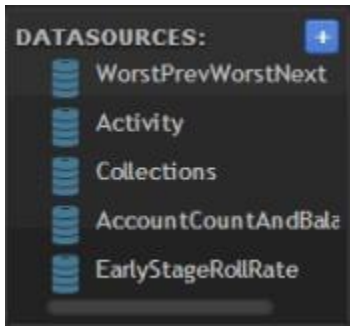

The **Add Data Source** dialog box appears.
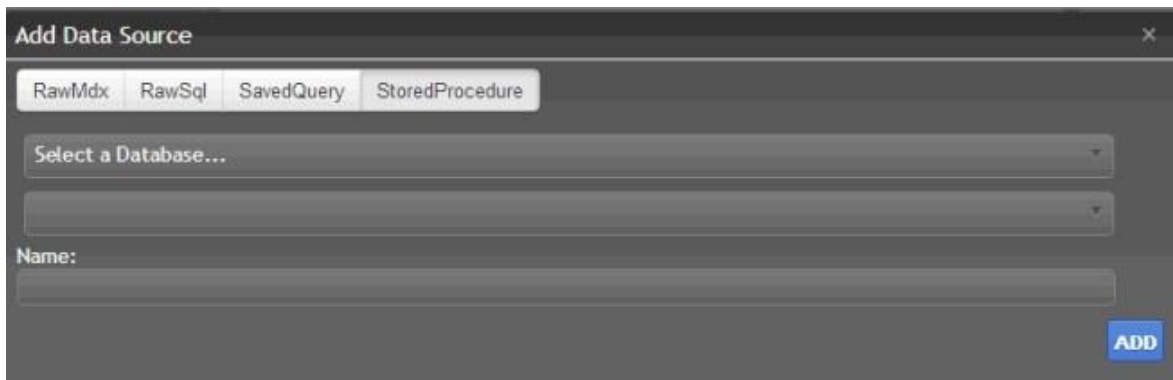
3. In the toolbar, click **StoredProcedure**.

4. In the **Select a Database** list box, click the database to query. The "Default" option represents the database specified in the connection string in the Dashboard Web.config file.

5. In the **Select a Stored Procedure** list box, click the stored procedure to use to retrieve data.

6. In the **Name** box, type a name for the data source and then click **Add**. Dashboard adds the Stored Procedure data source to the **Data Sources** section.

Modify a Stored Procedure Data Source

Use the **Edit Data Source** dialog box to modify a Stored Procedure data source. **To**

modify a Stored Procedure data source

1. Do one of the following:

- To open an existing dashboard, in the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.

- To add a dashboard, click the plus sign (**+**) tab. The dashboard displays in add mode.

2. In the **Data Sources** box, double-click the data source you set up using a stored procedure.
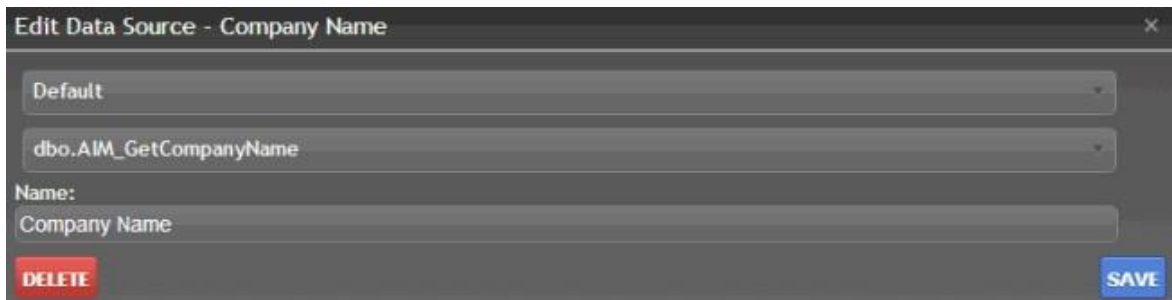
28

The **Edit Data Source** dialog box appears.

3. Modify the information as necessary and then click **Save**.

Note: To delete the data source, click **Delete**.

Gadgets

Gadgets

Gadgets display information on a dashboard, such as a collector's performance statistics or agency announcements. You associate a gadget to a data source, which supplies the data for the gadget. You can run multiple instances of a gadget simultaneously and configure each gadget separately.

Bar Gadget

Bar Gadget

Bar gadgets display data in a bar chart. The data that populates the bar chart comes from the data source associated to the gadget.

Add a Bar Gadget to a Dashboard

Use the Bar gadget to display data in a bar chart on the dashboard.

To add a Bar gadget to a dashboard

1. Do one of the following:

   - To open an existing dashboard, in the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.

   - To add a dashboard, in the toolbar, click the plus sign (**+**) tab. The dashboard displays in add mode.

2. In the **Gadgets** box, click **Bar Gadget** and drag it to a dashboard column.

3. Drop the gadget when the plus sign (+) appears.
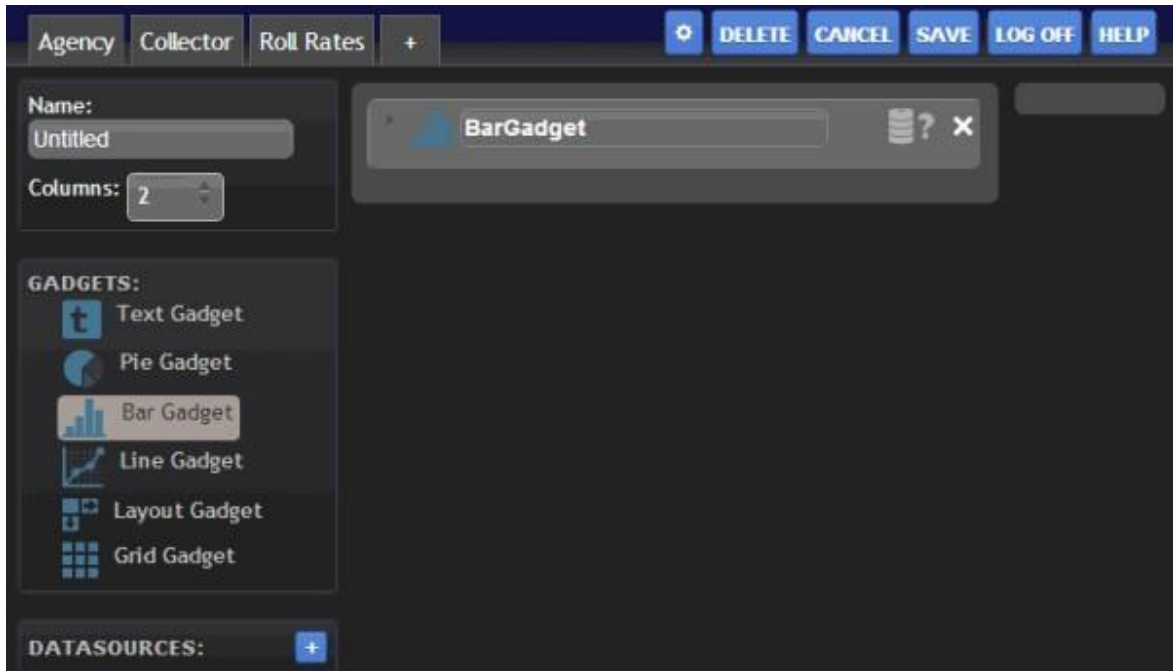
4. Do the steps to Configure a Bar Gadget.

Configure a Bar Gadget

You can configure and apply styles to a Bar gadget once it's added to a dashboard. Make sure that you have your data sources set up before configuring a gadget. For more information, see the topics under Data Sources.

To configure a Bar gadget

1. Click the arrow next to the Bar gadget title. The configuration options appear.
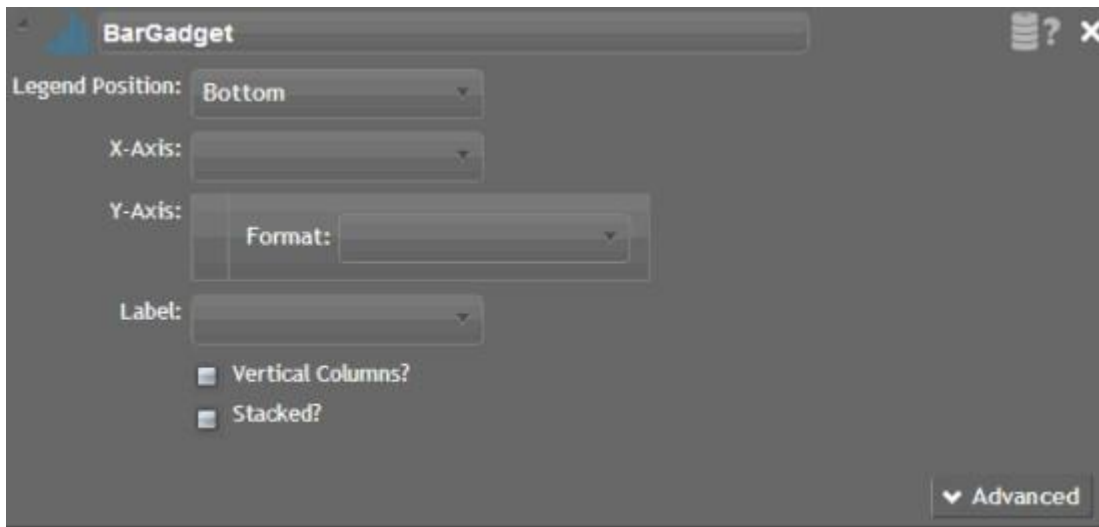
[Title]: Title of the gadget.

[Data Source]: Data source that provides the data that populates the bar chart. If you assigned a data source to the bar chart, the Data Source icon appears. Otherwise, the Data Source title appears.

Legend Position: Location on the bar chart to display the data legend. The legend tells you what each bar represents on the bar chart.

X-Axis: Value to display on the x-axis of the bar chart.

Y-Axis: Value to display on the y-axis of the bar chart.

Format: Format to apply to the values when they display on the bar chart (for example, integer, money, decimal, percent).

Label: Label to display for each bar on the bar chart.

Vertical Columns: If selected, the bars on the bar chart display vertically. If cleared, the bars display horizontally.
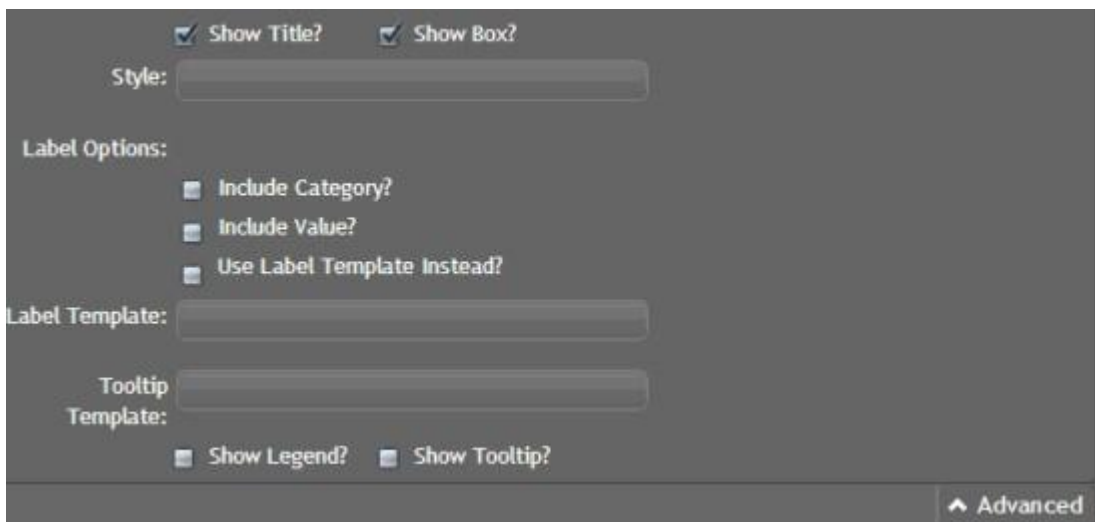
Stacked? If selected, creates a stacked chart (one graph overlays another) using all remaining columns, except Category, as values for each series. Stacked charts allow you to show two or more related series of data. For example, collected dollar amount and number of collections.

Advanced: Shows or hides the advanced configuration options.

2. Double-click **BarGadget** and type a title for the gadget.

3. In the **Data Sources** box, click a data source.
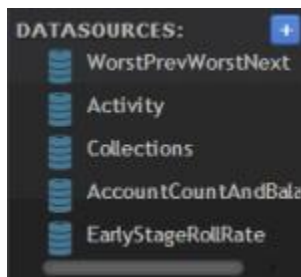
4. Drag the data source onto the Data Source icon in the Bar gadget, and drop it when the plus sign (+) appears. If no data sources exist, see the Data Sources topics for instructions on adding a specific data source.

5. Select the **Legend Position**, **x-axis**, **y-axis**, **Format**, and **Label**.

6. Select or clear the **Vertical Columns** and **Stacked** check boxes according to your preference.

7. Click **Advanced**. The advanced options appear.

Show Title: If selected, includes the gadget title when the bar chart displays on the dashboard.

Show Box: If selected, displays a border around the bar chart.

Style: CSS code for the style to apply to the bar chart. For example, to display the background of the bar chart in red, in the **Style** box, type "background-color:red". To apply multiple styles to the bar chart, separate the CSS code with a semi-colon. For example, to display the background of the bar chart in red with a solid border, in the **Style** box, type "background-color:red; borderstyle:solid".

Note: For more information about styles, see http://www.cheatography.com/davechild/cheatsheets/css2/.

Label Options: Legend labels to use.

> **Include Category:** If selected, displays the category as a label on the bar chart.

> **Include Value:** If selected, displays the value as a label on the bar chart.

> **Use Label Template Instead:** If selected, uses the specified label template to display a label on the bar chart.

Label Template: Kendo template to apply to the bar chart legend labels. For example, to display the label as a user's first name and last name, type "#= firstName #! #=lastName #".

Tooltip Template: Kendo template to apply to the tooltips that appear when a user rests the mouse on an area of the bar chart. For example, to display the tooltip as a user's first name and last name, type "#= firstName #! #=lastName #".

Note: For more information about Kendo templates, see http://docs.kendoui.com/documentation/getting-started/framework/templates/overview.

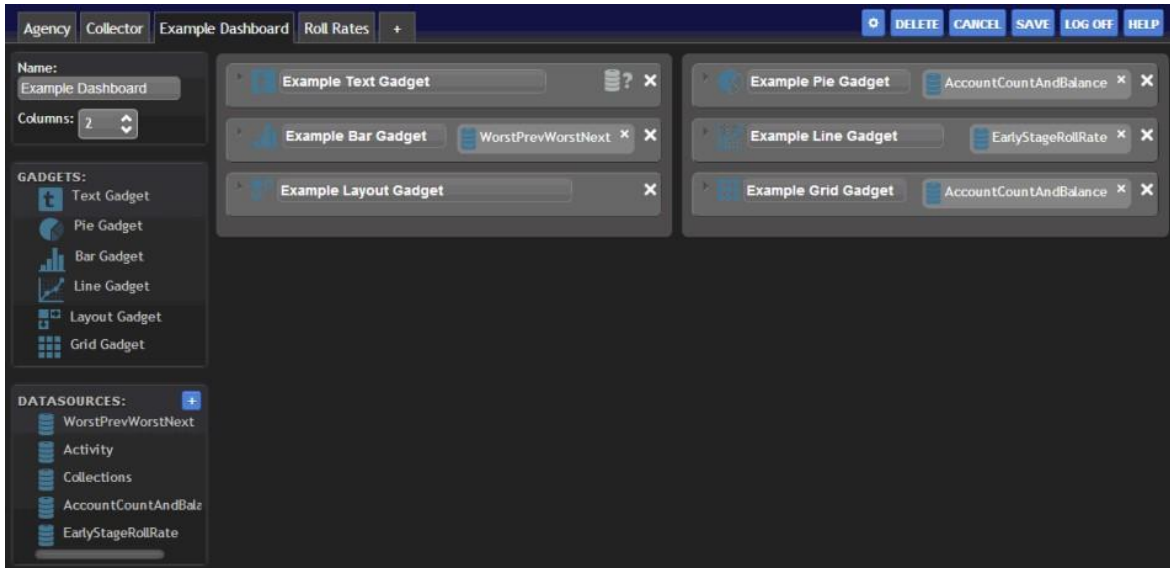**Show Legend:** If selected, displays the legend for the bar chart.

Show Tooltip: If selected, displays information about a bar in the chart when a user rests the mouse on the bar.

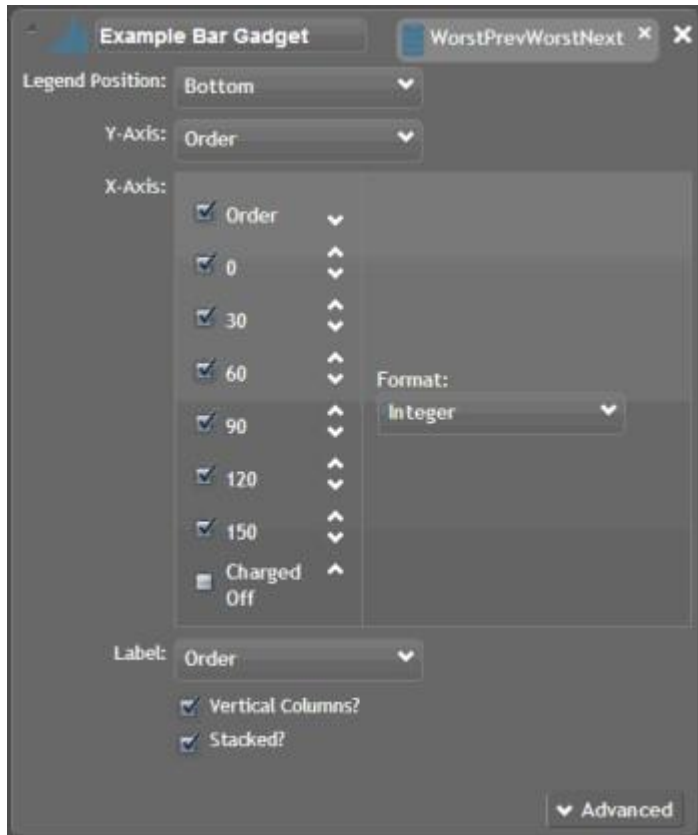8. Complete the advanced options according to your preference and then **Save**.

Modify a Bar Gadget

You can modify a Bar gadget once it's added to a dashboard. **To**

modify a Bar gadget

1. In the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.

2. Click the arrow next to the Bar gadget title. The configuration options appear.

3. To change the title of the gadget, select the text in the gadget title box and then type a new title.

4. To change the data source, do the following:

a. In the gadget, click the **X** next to the data source to remove it.

b. Drag and drop a different data source onto the Data Source icon .

5. To move the gadget to a different column of the dashboard, drag and drop it to another column.

6. To modify advanced options, click **Advanced**, modify the information as necessary, and then click **Save**.

7. To delete the gadget from the dashboard, click the **X** in the upper right corner of the gadget.
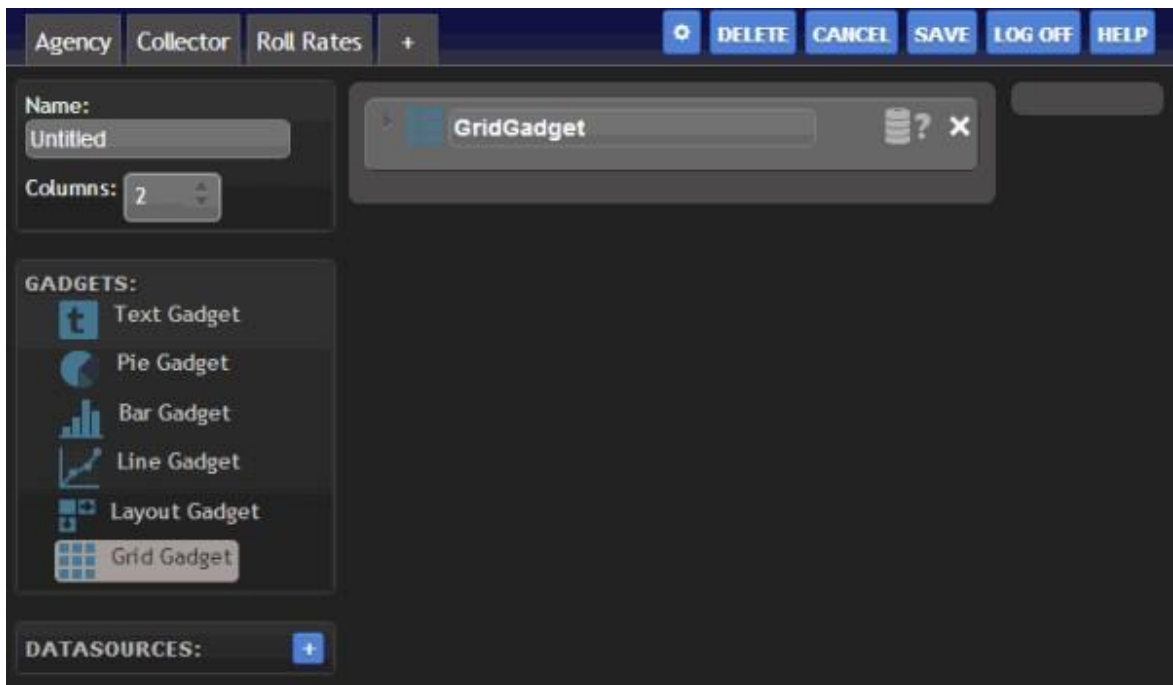
Grid Gadget

Grid Gadget

Grid gadgets display data in a data grid. The data that populates the data grid comes from the <u>data source</u> associated to the gadget.

Add a Grid Gadget to a Dashboard

Use the Grid gadget to display data in a data grid on the dashboard.

To add a Grid gadget to a dashboard

34

1. Do one of the following:

- To open an existing dashboard, in the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.

- To add a dashboard, click the plus sign (**+**) tab. The dashboard displays in add mode.

2. In the **Gadgets** box, click **Grid Gadget** and drag it to a dashboard column.

3. Drop the gadget when the plus sign (+) appears.

4. Do the steps to Configure a Grid Gadget.

Configure a Grid Gadget

You can configure and apply styles to a Grid gadget once it's added to a dashboard. Make sure that you have your data sources set up before configuring a gadget. For more information, see the topics under Data Sources.

To configure a Grid gadget

1. Click the arrow next to the Grid gadget title. The configuration options appear.
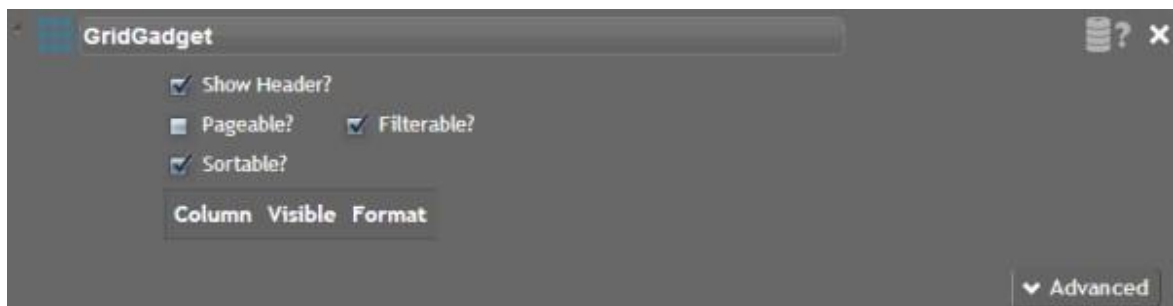
[Title]: Title of the gadget.

[Data Source]: Data source that provides the data that populates the data grid. If you assigned a data source to the data grid, the Data Source icon appears. Otherwise, the Data Source title appears.

**Show Header:** If selected, displays the data grid column headings.

Pageable: If selected, spans the data grid rows across multiple pages and provides page navigation. Select this check box to limit scrolling when the data grid contains several rows of data.

Filterable: If selected, allows users to filter the data in the data grid.

Sortable: If selected, allows users to sort the data in the data grid.

Advanced: Shows or hides the advanced configuration options.

2. Double-click **GridGadget** and type a title for the gadget.

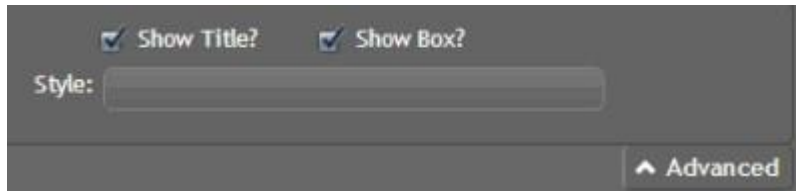3. In the **Data Sources** box, click a data source.
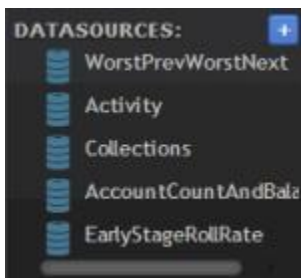
4. Drag the data source onto the Data Source icon in the Grid gadget, and drop it when the plus sign (+) appears. If no data sources exist, see the Data Sources topics for instructions on adding a specific data source.

5. Select or clear the **Show Header**, **Pageable**, **Sortable**, and **Filterable** check boxes according to your preference.

6. Once you attach a data source to the Grid gadget, the data columns appear.

7. Select the check box for each column to include in the data grid and clear the check box for each column to exclude from the data grid.

8. If a column is numeric, click the format to apply when it's displayed in the data grid.

9. Click **Advanced**. The advanced options appear.

Show Title: If selected, includes the gadget title when the bar chart displays on the dashboard.

Show Box: If selected, displays a border around the bar chart.

Style: CSS code for the style to apply to the data grid. For example, to display the background of the data grid in red, in the **Style** box, type "background-color:red". To apply multiple styles to the data grid, separate the CSS code with a semi-colon. For example, to display the background of the data grid in red with a solid border, in the **Style** box, type "background-color:red; borderstyle:solid".
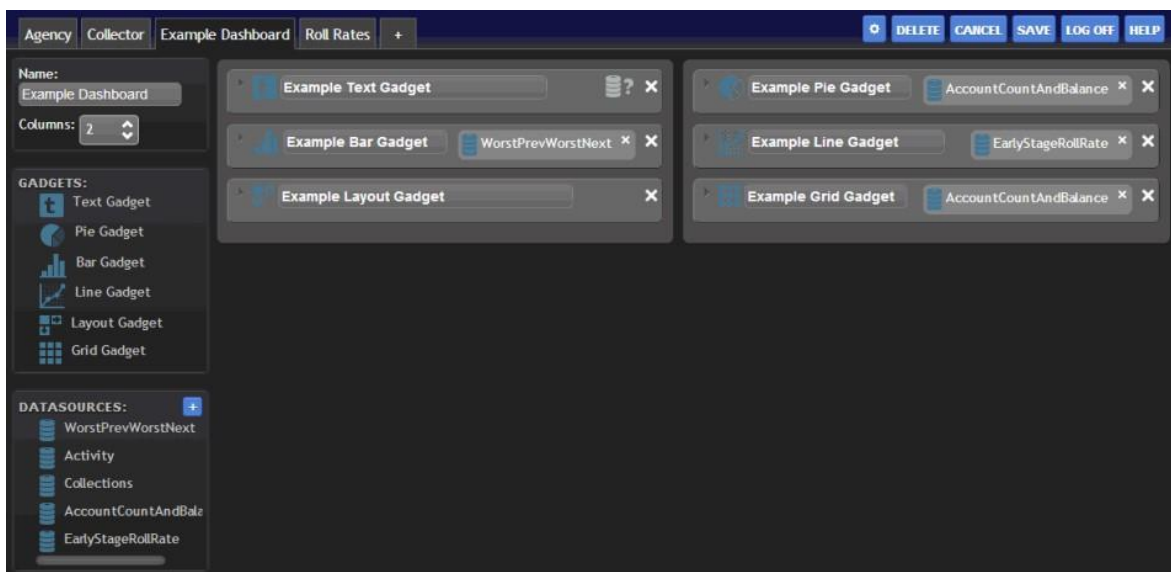
Note: For more information about styles, see http://www.cheatography.com/davechild/cheatsheets/css2/.

10. Complete the advanced options according to your preference and then **Save**.
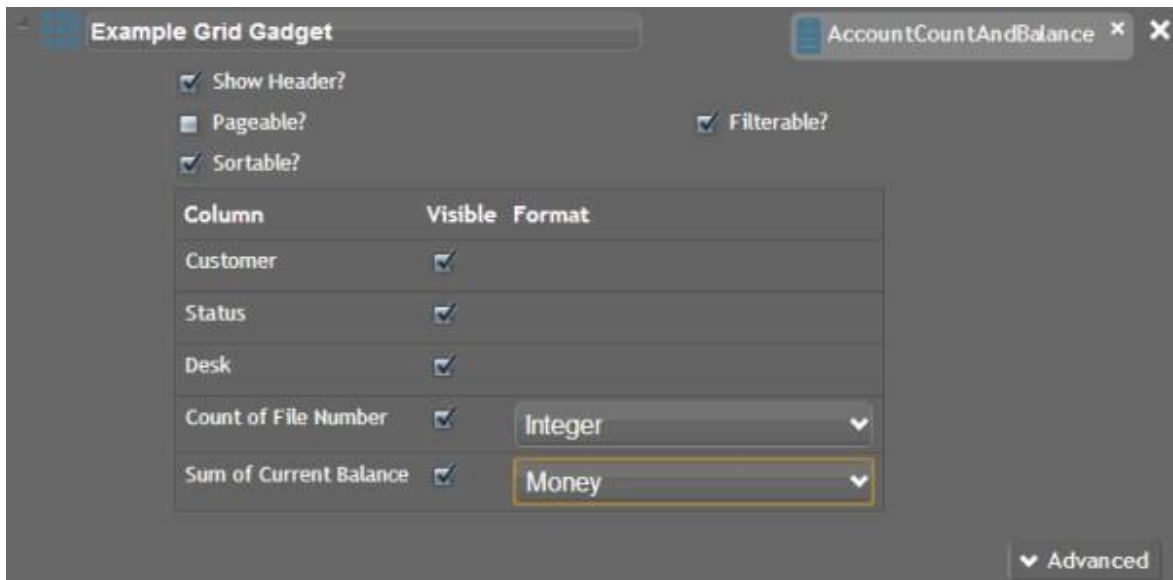
Modify a Grid Gadget

You can modify a Grid gadget once it's added to a dashboard. **To**

modify a Grid gadget

1. In the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.

2. Click the arrow next to the Grid gadget title. The configuration options appear.

3. To change the title of the gadget, select the text in the gadget title box and then type a new title.

4. To change the data source, do the following:

a. In the gadget, click the **X** next to the data source to remove it.

b. Drag and drop a different data source onto the Data Source icon .

5. To move the gadget to a different column of the dashboard, drag and drop it to another column.

6. To modify advanced options, click **Advanced**, modify the information as necessary, and then click **Save**.

7. To delete the gadget from the dashboard, click the **X** in the upper right corner of the gadget.

Layout Gadget

Layout Gadget

Layout gadgets group multiple gadgets of any type into a single gadget. The Layout gadget is the parent gadget and the gadgets within the Layout gadget are the child gadgets.
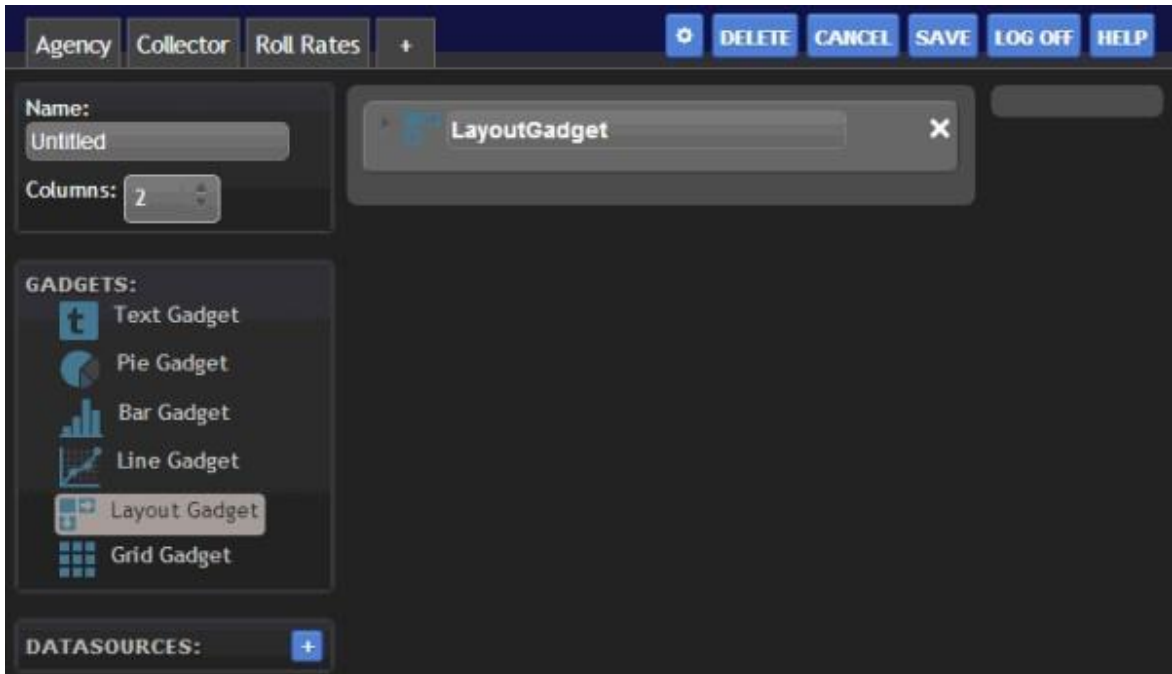
Add a Layout Gadget to a Dashboard

Use the Layout gadget to group multiple gadgets of any type into a single Layout gadget. The Layout gadget is the parent gadget and the gadgets within it are the child gadgets.

To add a Layout gadget to a dashboard

1. Do one of the following:

- To open an existing dashboard, in the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.

- To add a dashboard, click the plus sign (**+**) tab. The dashboard displays in add mode.

2. In the **Gadgets** box, click **Layout Gadget** and drag it to a dashboard column.

3. Drop the gadget when the plus sign (+) appears.

4. Do the steps to Configure a Layout Gadget.

Configure a Layout Gadget

You can configure and apply styles to a Layout gadget once it's added to a dashboard. The Layout gadget is the parent gadget and the gadgets within it are the child gadgets. You can configure and apply styles to the child gadgets associated to a parent Layout gadget. Make sure that you have your data sources set up before configuring the child gadgets within the parent gadget. For more information, see the topics under Data Sources.

To configure a Layout gadget

1. Click the arrow next to the Layout gadget title. The configuration options appear.

[Title]: Title of the gadget.

Flow: Position of the child gadgets within the parent Layout gadget.

[Child Gadgets]: Child gadgets to display within the parent Layout gadget.

**Advanced:** Shows or hides the advanced configuration options.

2. Double-click **LayoutGadget** and type a title for the gadget.

3. In the **Flow** list box, click the position within the Layout gadget to place the child gadgets.

4. In the **Gadgets** box, click a gadget and drag it to the Layout gadget.

5. Drop the gadget on the **Drag child gadgets here** box when the plus sign (+) appears.

6. Continue adding gadgets according to your preference.

7. Assign a data source to, and configure each child gadget. For more information about configuring a child gadget, see the help topic for configuring that specific gadget.

Note: You assign data sources at the child level, not the parent level.

8. Click **Advanced**. The advanced options appear.
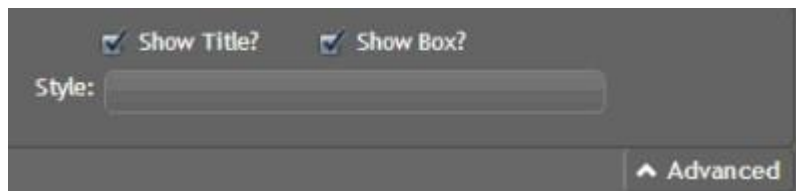
Show Title: If selected, includes the Layout gadget title on the dashboard.

Show Box: If selected, displays a border around the Layout gadget on the dashboard.

Style: CSS code for the style to apply to the bar chart. For example, to display the background of the bar chart in red, in the **Style** box, type "background-color:red". To apply multiple styles to the bar chart, separate the CSS code with a semi-colon. For example, to display the background of the bar chart in red with a solid border, in the **Style** box, type "background-color:red; borderstyle:solid".

Note: For more information about styles, see http://www.cheatography.com/davechild/cheatsheets/css2/.

9. Complete the advanced options according to your preference and then **Save**.

Modify a Layout Gadget

You can modify a Layout gadget once it's added to a dashboard. **To**

modify a Layout gadget

1. In the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.
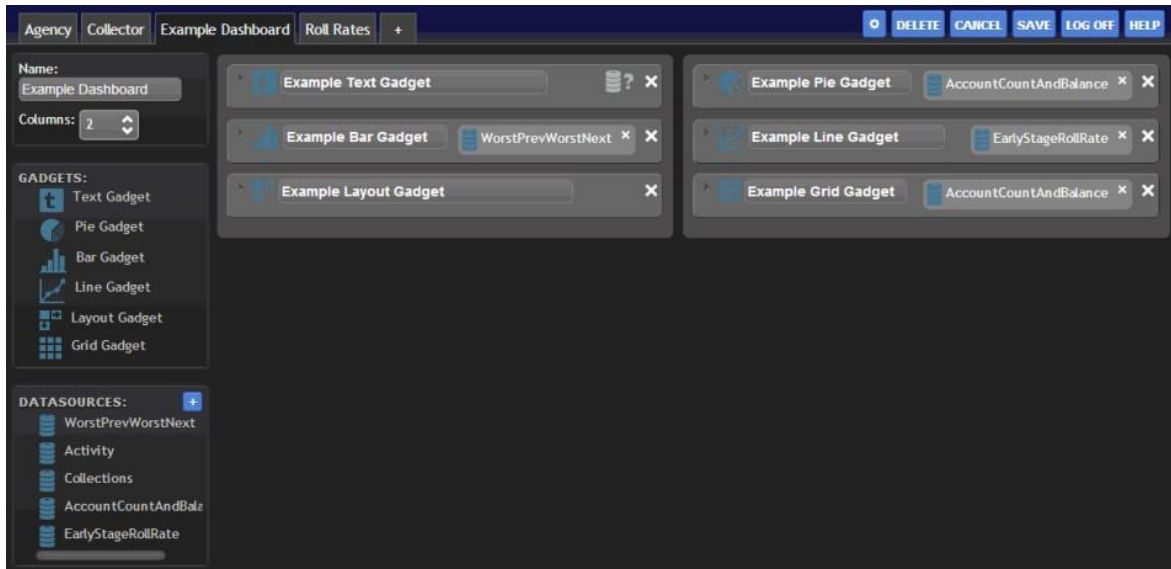
2. Click the arrow next to the Layout gadget title. The configuration options appear.
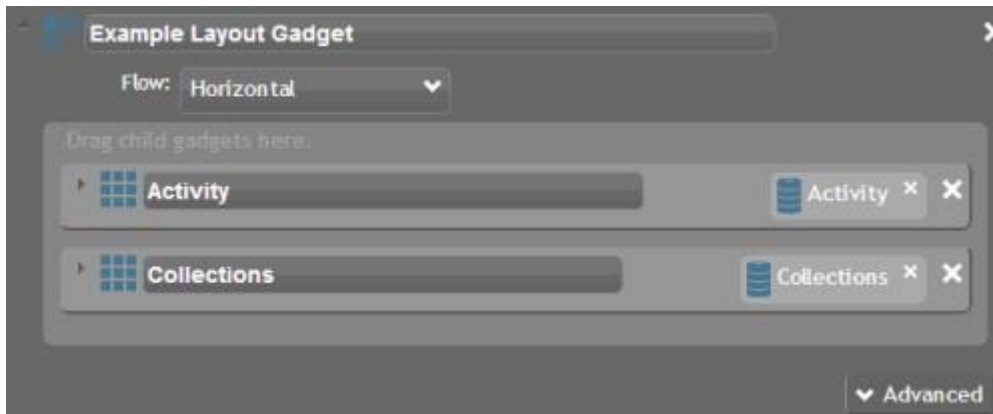
3. To change the title of the gadget, select the text in the gadget title box and then type a new title.

4. To change the position of the child gadgets within the parent gadget, in the **Flow** list box, click the position.

5. To modify a child gadget, click the arrow next to the child gadget title. For more information about configuring a child gadget, see the help topic for configuring that specific gadget.

6. To move the gadget to a different column of the dashboard, drag and drop it to another column.

7. To modify advanced options, click **Advanced**, modify the information as necessary, and then click **Save**.

8. To delete the gadget from the dashboard, click the **X** in the upper right corner of the gadget.
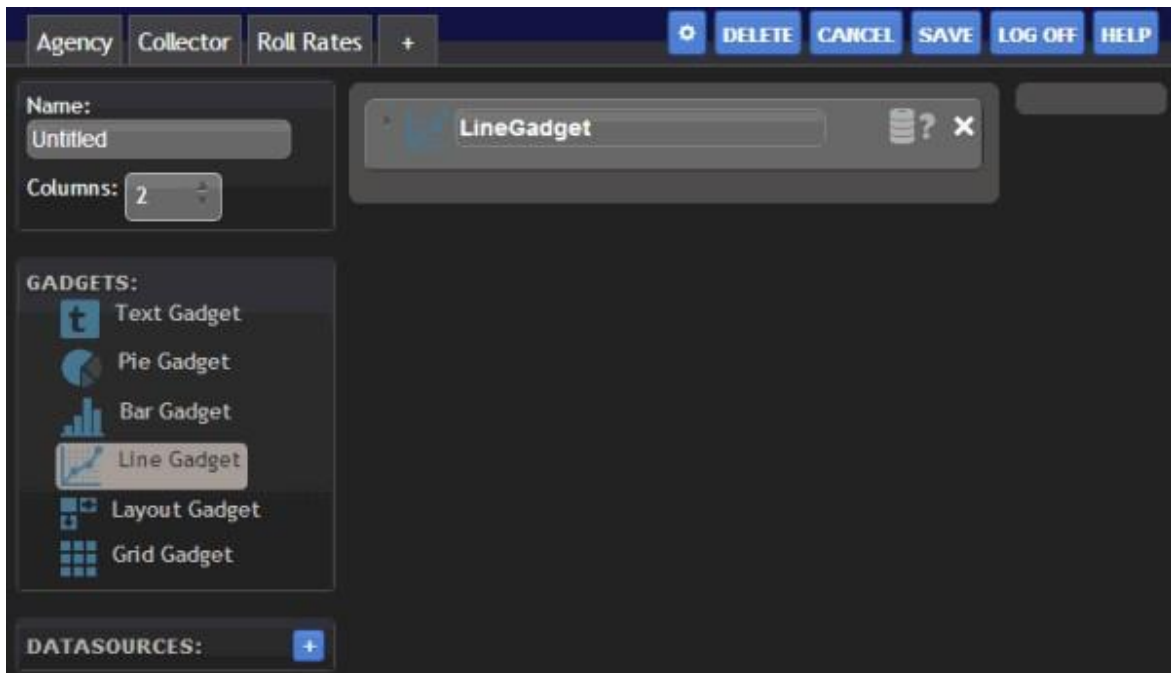
Line Gadget

Line Gadget

Line gadgets display data in a line graph. The data that populates the line graph comes from the <u>data source</u> associated to the gadget.

Add a Line Gadget to a Dashboard

Use the Line gadget to display data in a line graph on the dashboard.

To add a Line gadget to a dashboard

1. Do one of the following:

   • To open an existing dashboard, in the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.

   • To add a dashboard, click the plus sign (**+**) tab. The dashboard displays in add mode.

2. In the **Gadgets** box, click **Line Gadget** and drag it to a dashboard column.

3. Drop the gadget when the plus sign (+) appears.

4. Do the steps to <u>Configure a Line Gadget</u>.

Configure a Line Gadget

You can configure and apply styles to a Line gadget once it's added to a dashboard. Make sure that you have your data sources set up before configuring a gadget. For more information, see the topics under <u>Data Sources</u>.

To configure a Line gadget

1. Click the arrow next to the Line gadget title. The configuration options appear.
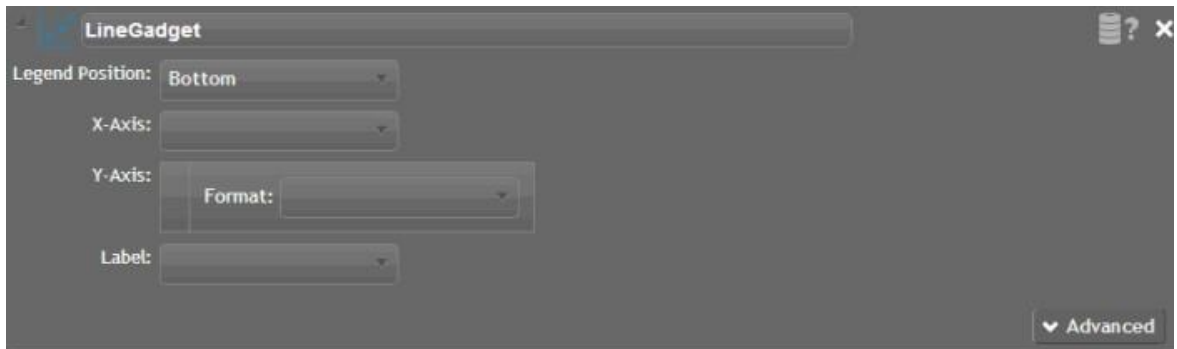
[Title]: Title of the gadget.

[Data Source]: Data source that provides the data that populates the line graph. If you assigned a data source to the line graph, the Data Source icon appears. Otherwise, the Data Source title appears.

Legend Position: Location on the line graph to display the data legend. The legend tells you what each line represents on the line graph.

X-Axis: Value to display on the x-axis of the line graph.

Y-Axis: Value to display on the y-axis of the line graph.

Format: Format to apply to the values when they display on the line graph (for example, integer, money, decimal, percent).

Label: Label to display for each bar on the bar chart.

Advanced: Shows or hides the advanced configuration options.

2. Double-click **LineGadget** and type a title for the gadget.

3. In the **Data Sources** box, click a data source.
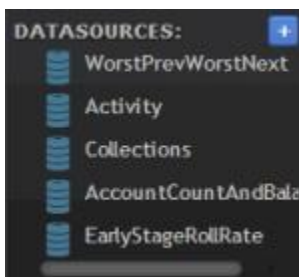
4. Drag the data source onto the Data Source icon in the Line gadget, and drop it when the plus sign (+) appears. If no data sources exist, see the Data Sources topics for instructions on adding a specific data source.

5. Select the **Legend Position**, **x-axis**, **y-axis**, **Format**, and **Label**.

6. Click **Advanced**. The advanced options appear.

Show Title: If selected, includes the gadget title when the line graph displays on the dashboard.

Show Box: If selected, displays a border around the line graph.

Style: CSS code for the style to apply to the line graph. For example, to display the background of the line graph in red, in the **Style** box, type "background-color:red". To apply multiple styles to the line graph, separate the CSS code with a semi-colon. For example, to display the background of the line graph in red with a solid border, in the **Style** box, type "background-color:red; borderstyle:solid".

Note: For more information about styles, see http://www.cheatography.com/davechild/cheatsheets/css2/.

Label Options: Legend labels to use.

> **Include Category:** If selected, displays the category as a label on the line graph.

> **Include Value:** If selected, displays the value as a label on the line graph.

> **Use Label Template Instead:** If selected, uses the specified label template to display a label on the line graph.

Label Template: Kendo template to apply to the line graph legend labels. For example, to display the label as a user's first name and last name, type "#= firstName #! #=lastName #".

Tooltip Template: Kendo template to apply to the tooltips that appear when a user rests the mouse on an area of the line graph. For example, to display the tooltip as a user's first name and last name, type "#= firstName #! #=lastName #".

Note: For more information about Kendo templates, see http://docs.kendoui.com/documentation/getting-started/framework/templates/overview.

Show Legend: If selected, displays the legend for the line graph.

Show Tooltip: If selected, displays information about a line in the graph when a user rests the mouse on the line.
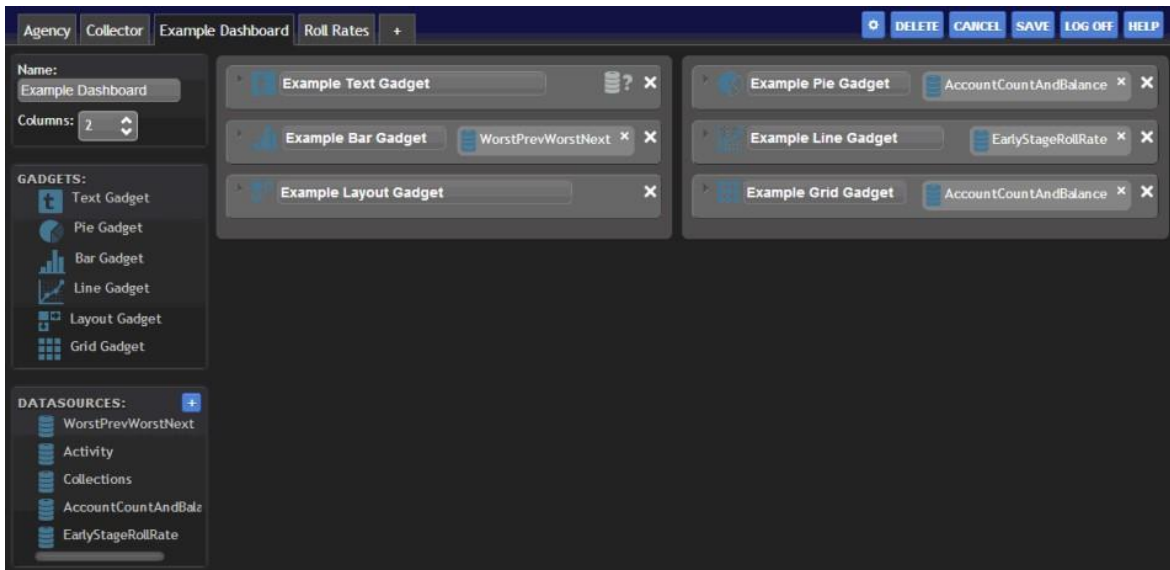
7. Complete the advanced options according to your preference and then **Save**.
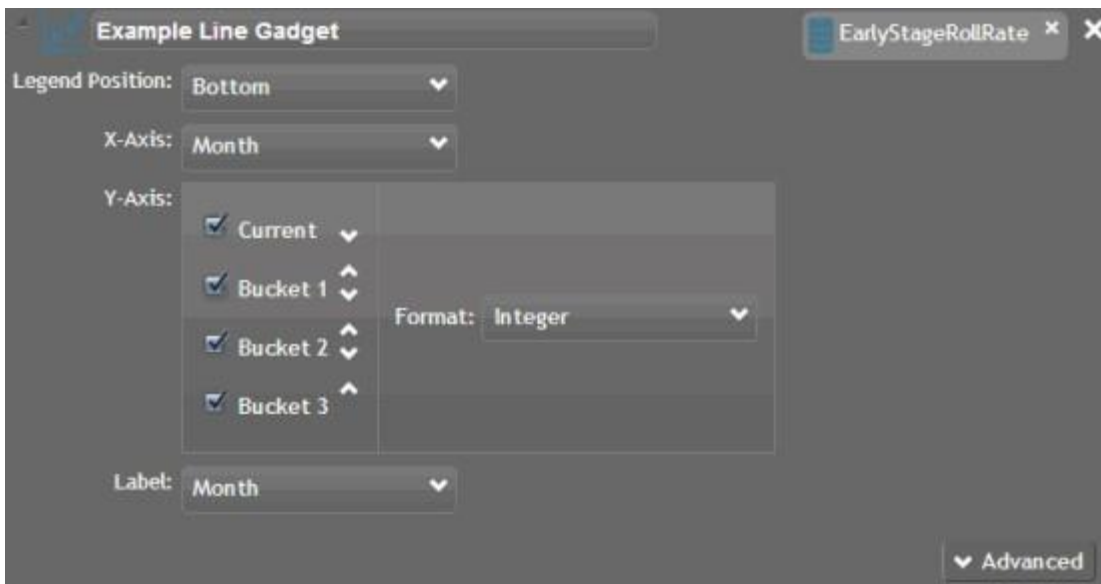
Modify a Line Gadget

You can modify a Line gadget once it's added to a dashboard.

To modify a Line gadget

1. In the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.

2. Click the arrow next to the Line gadget title. The configuration options appear.

3. To change the title of the gadget, select the text in the gadget title box and then type a new title.

4. To change the data source, do the following:

a.   In the gadget, click the **X** next to the data source to remove it.

b.   Drag and drop a different data source onto the Data Source icon .

5. To move the gadget to a different column of the dashboard, drag and drop it to another column.

6. To modify advanced options, click **Advanced**, modify the information as necessary, and then click **Save**.

7. To delete the gadget from the dashboard, click the **X** in the upper right corner of the gadget.
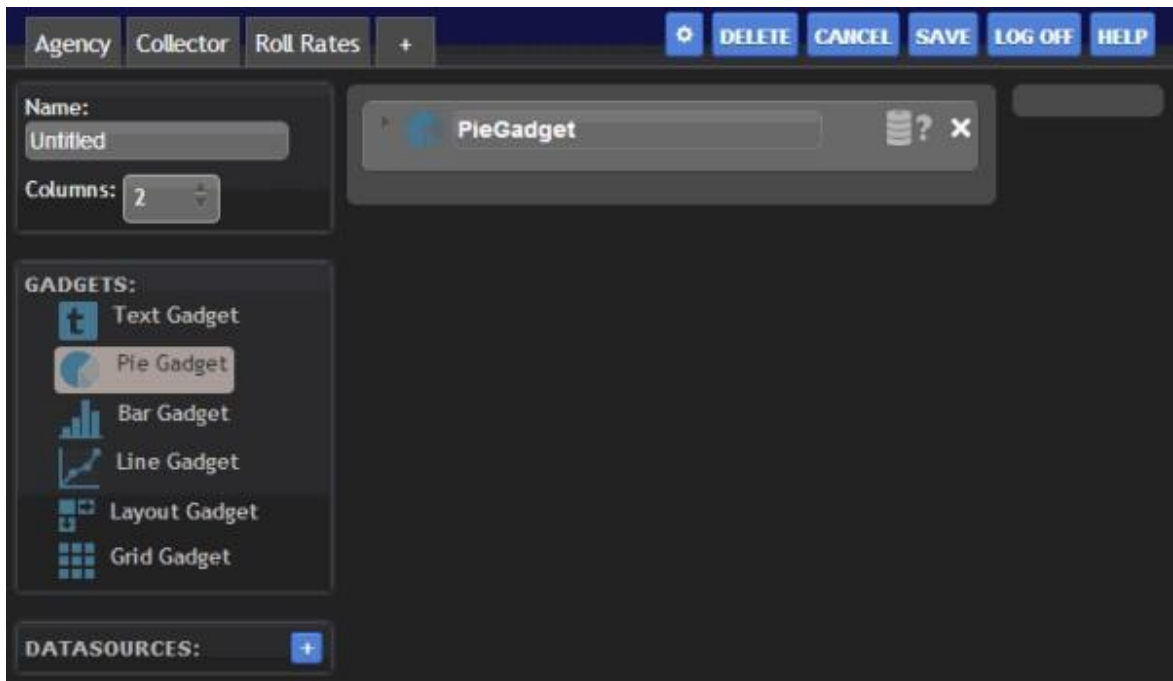
Pie Gadget

Pie Gadget

Pie gadgets display data in a pie chart. The data that populates the pie chart comes from the <u>data source</u> associated to the gadget.

Add a Pie Gadget to a Dashboard

Use the Pie gadget to display data in a pie chart on the dashboard.

To add a Pie gadget to a dashboard

1. Do one of the following:

- To open an existing dashboard, in the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.

- To add a dashboard, click the plus sign (**+**) tab. The dashboard displays in add mode.

2. In the **Gadgets** box, click **Bar Gadget** and drag it to a dashboard column.

3. Drop the gadget when the plus sign (+) appears.

4. Do the steps to <u>Configure a Pie Gadget</u>.

Configure a Pie Gadget

You can configure and apply styles to a Pie gadget once it's added to a dashboard. Make sure that you have your data sources set up before configuring a gadget. For more information, see the topics under [Data Sources](#).

To configure a Pie gadget

1. Click the arrow next to the Pie gadget title. The configuration options appear.
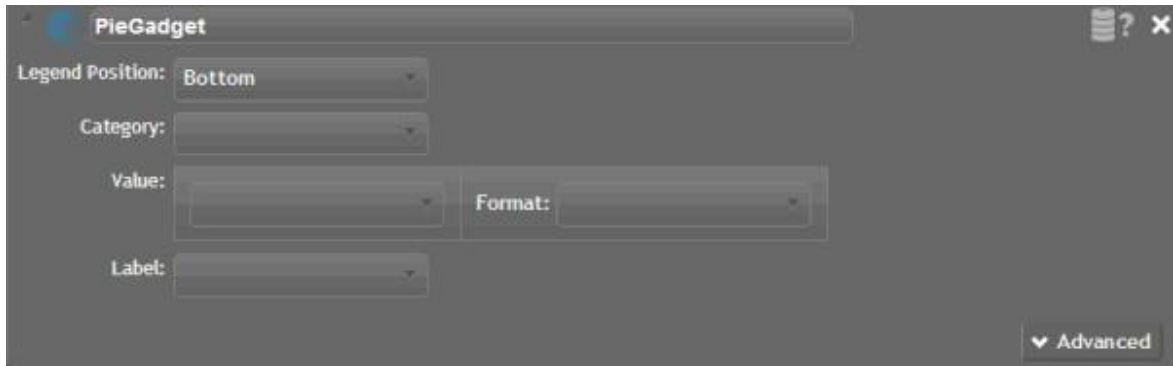
[Title]: Title of the gadget.

[Data Source]: Data source that provides the data that populates the pie chart. If you assigned a data source to the pie chart, the Data Source icon appears. Otherwise, the Data Source title appears.

Legend Position: Location on the pie chart to display the data legend. The legend tells you what each pie slice represents on the pie chart.

**Category:** Category to display on the x-axis of the pie chart.

Value: Value to display on the y-axis of the pie chart.

Format: Format to apply to the values when they display on the pie chart (for example, integer, money, decimal, percent).

Label: Label to display for each pie slice on the pie chart.

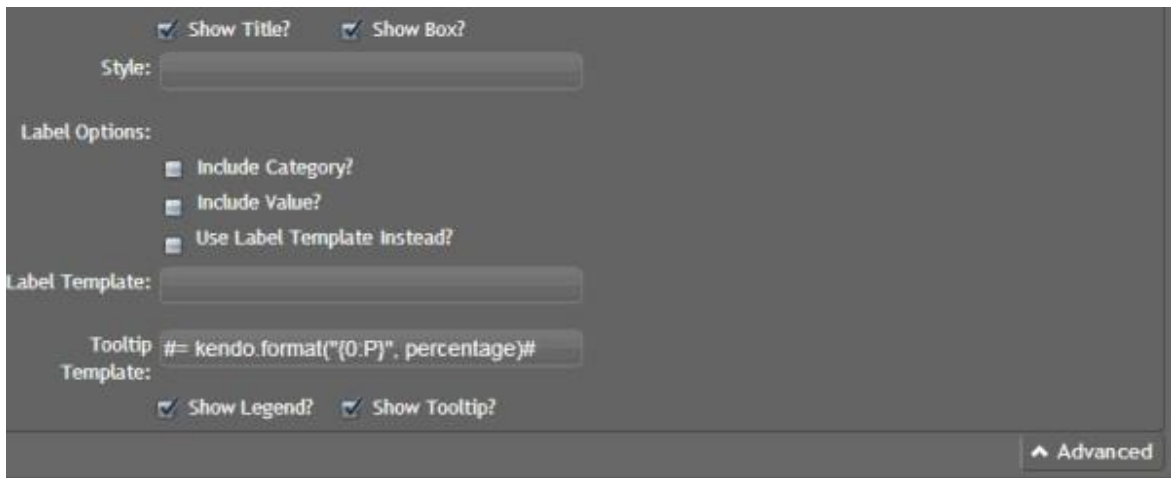**Advanced:** Shows or hides the advanced configuration options.

2. Double-click **PieGadget** and type a title for the gadget.

3. In the **Data Sources** box, click a data source.
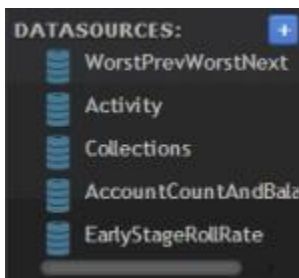
4. Drag the data source onto the Data Source icon in the Pie gadget, and drop it when the plus sign (+) appears. If no data sources exist, see the [Data Sources](#) topics for instructions on adding a specific data source.

5. Select the **Legend Position**, **Category**, **Value**, **Format**, and **Label**.

6. Click **Advanced**. The advanced options appear.

Show Title: If selected, includes the gadget title when the pie chart displays on the dashboard.

Show Box: If selected, displays a border around the pie chart.

Style: CSS code for the style to apply to the pie chart. For example, to display the background of the pie chart in red, in the **Style** box, type "background-color:red". To apply multiple styles to the pie chart, separate the CSS code with a semi-colon. For example, to display the background of the pie chart in red with a solid border, in the **Style** box, type "background-color:red; borderstyle:solid".

Note: For more information about styles, see http://www.cheatography.com/davechild/cheatsheets/css2/.

Label Options: Legend labels to use.

> **Include Category:** If selected, displays the category as a label on the pie chart.

> **Include Value:** If selected, displays the value as a label on the pie chart.

> **Use Label Template Instead:** If selected, uses the specified label template to display a label on the pie chart.

Label Template: Kendo template to apply to the pie chart legend labels. For example, to display the label as a user's first name and last name, type "#= firstName #! #=lastName #".

Tooltip Template: Kendo template to apply to the tooltips that appear when a user rests the mouse on an area of the pie chart. For example, to display the tooltip as a user's first name and last name, type "#= firstName #! #=lastName #".

Note: For more information about Kendo templates, see http://docs.kendoui.com/documentation/getting-started/framework/templates/overview.

Show Legend: If selected, displays the legend for the pie chart.
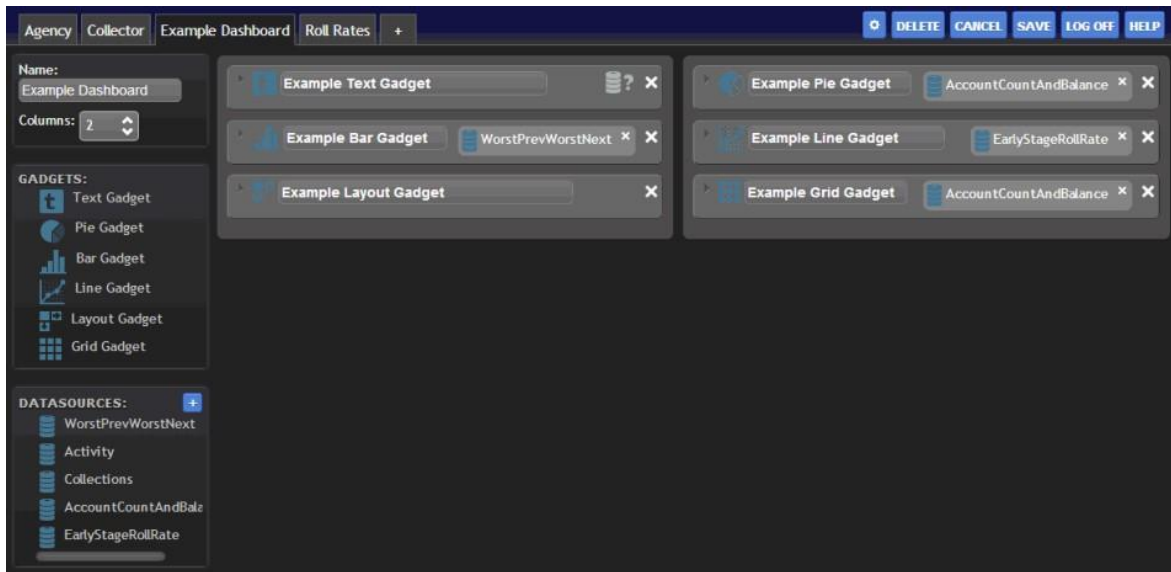
Show Tooltip: If selected, displays information about a pie slice in the chart when a user rests the mouse on the bar.

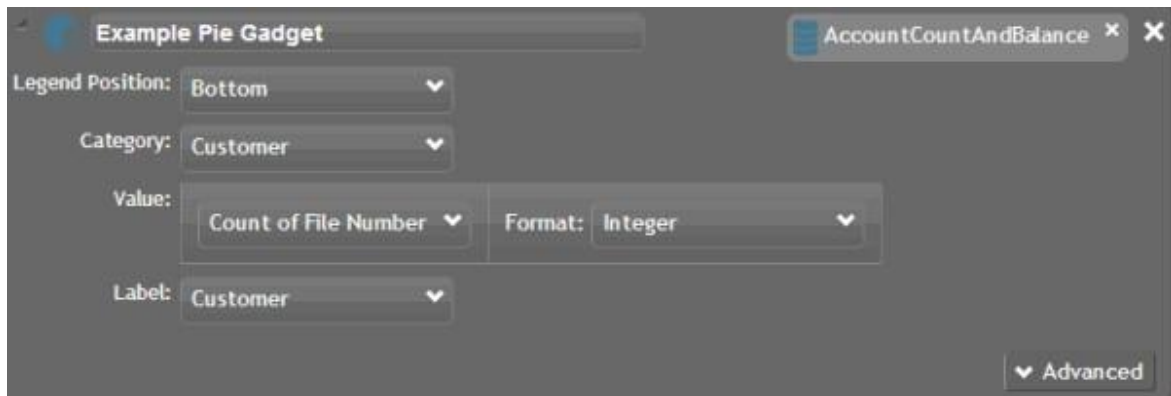7. Complete the advanced options according to your preference and then **Save**.

Modify a Pie Gadget

You can modify a Pie gadget once it's added to a dashboard. **To**

modify a Pie gadget

1. In the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.

2. Click the arrow next to the Pie gadget title. The configuration options appear.

3. To change the title of the gadget, select the text in the gadget title box and then type a new title.

4. To change the data source, do the following:

a.   In the gadget, click the **X** next to the data source to remove it.

b.   Drag and drop a different data source onto the Data Source icon .

5. To move the gadget to a different column of the dashboard, drag and drop it to another column.

6. To modify advanced options, click **Advanced**, modify the information as necessary, and then click **Save**.

7. To delete the gadget from the dashboard, click the **X** in the upper right corner of the gadget.

Text Gadget

Text Gadget

Text gadgets display a message to the logged on user. You can create the message using text, code, data from a data source, or any combination of these methods. You can format the message using HTML tags.

Examples

The following examples show what to type in the **Text** box when configuring the Text gadget to display a message to the user.

Text only

The following example shows how to display a text-only message.

Welcome to Dashboard

The resulting message that displays to the user is, "Welcome to Dashboard."

You can use an HTML tag to format the message. The following example applies the bold style to "Dashboard."

Welcome to <b>Dashboard<\b>

The resulting message to the user is, "Welcome to **Dashboard**."

Text and code

The following example shows how to use text and code to display a message.

<div style="font-size:24px;margin-top:5px;text-align:left">@{

var timeofday = "morning";   var hour = DateTime.Now.Hour;

if(hour < 12) timeofday = "morning"; else if (hour < 17)

timeofday = "afternoon";   else

   timeofday = "evening";

}

Good <i>@timeofday</i>, @User.Identity.Name</div>

The resulting message that displays to the user is, "Good *afternoon*, Joe Smith." The message breaks down as follows:

"Good" is specific text you typed.

"afternoon" is based on the time of day and has the italic style applied.

"Joe Smith" is based on the logged on user's ID.

Text and data from a data source

The following example shows how to use text and a data source to display a message. This example is for a data source that returns one row of values that includes the user name, last payment amount, and last payment date and time.

$(Name), your last payment to post was for $(PaymentAmount) dollars on $(LastPaymentDateTime).

The resulting message that displays to the user is, "Joe Smith, your last payment to post was for 500 dollars on 2/7/2014 3:00 PM." The message breaks down as follows:

"Joe Smith" is the user ID from the data source.

", your last payment to post was for " is specific text you typed.

"500" is the payment amount from the data source.

" dollars on " is specific text you typed.

"2/7/2014 3:00 PM" is the payment date and time from the data source.

As with the other methods for creating a message, you can use HTML tags to format the message. For example, to apply the bold style to the payment amount, type the following:

<b>$(PaymentAmount)<\b>

Ensure that you insert punctuation and spaces in the appropriate places so that the text doesn't run together.

Add a Text Gadget to a Dashboard

Use the Text gadget to display custom text on a dashboard. **To**

add a Text gadget to a dashboard

1. Do one of the following:

   - To open an existing dashboard, in the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.

   - To add a dashboard, click the plus sign (**+**) tab. The dashboard displays in add mode.

2. In the **Gadgets** box, click **Text Gadget** and drag it to a dashboard column.

3. Drop the gadget when the plus sign (+) appears.
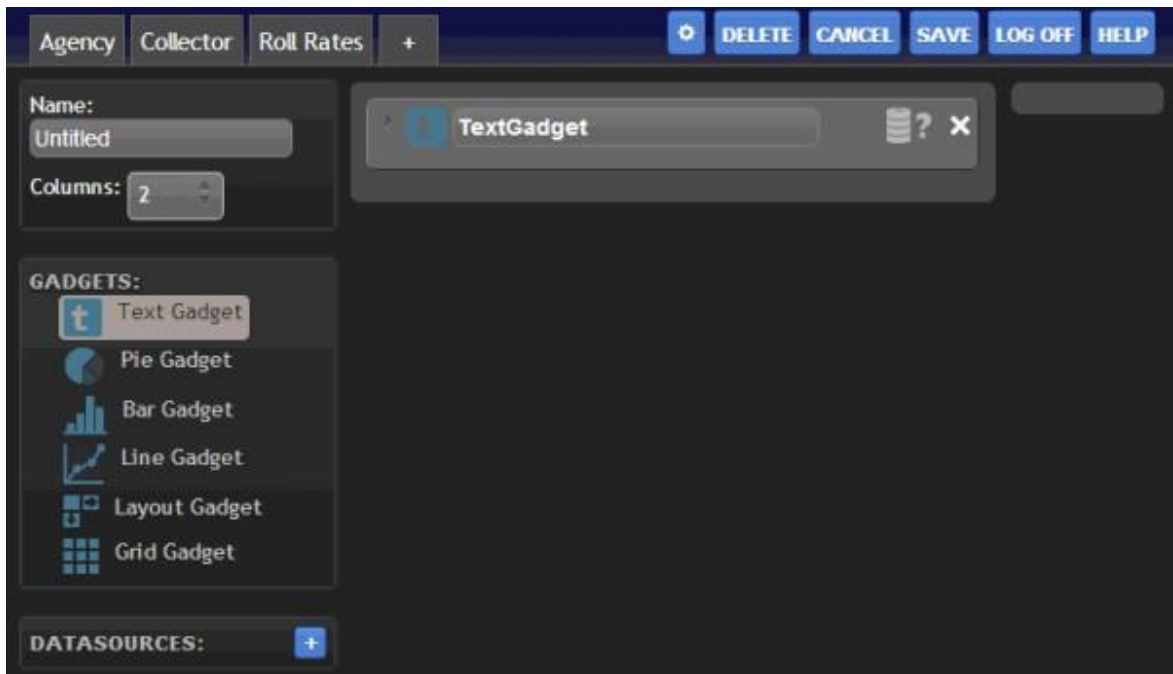
4. Do the steps to Configure a Text Gadget.

Configure a Text Gadget

You can configure and apply styles to a Text gadget once it's added to a dashboard. To use a data source with a Text gadget, make sure that you have the data source set up before configuring the gadget. For more information, see the topics under Data Sources.

To configure a Text gadget

1. Click the arrow next to the gadget title. The configuration options appear.

[Title]: Title of the gadget.

[Data Source]: Data source that provides the data to include in the message. If you assigned a data source to the message, the Data Source icon appears. Otherwise, the Data Source title appears.

Text: Text, code, or data that creates a message to display to the user. You can type specific text, use code to create the text, use a data source to create the text, or use any combination of the three methods. The system validates the spelling as you type the text and underlines any misspelled words.

Advanced: Shows or hides the advanced configuration options.

2. Double-click **TextGadget** and type a title for the gadget.

3. To include data from a data source, do the following:

    a.   In the **Data Sources** box, click a data source.

    b.   Drag the data source onto the Data Source icon in the Text gadget, and drop it when the plus sign (+) appears. If no data sources exist, see the Data Sources topics for instructions on adding a specific data source.

4. In the text box, type text, code, data source columns, or any combination thereof to create the message to display to the user. For more information, see Text Gadget.

5. Click **Advanced**. The advanced options appear.

Show Title: If selected, includes the gadget title when the text displays on the dashboard.

Show Box: If selected, displays a border around the text.

Style: CSS code for the style to apply to the data grid. For example, to display the background of the data grid in red, in the **Style** box, type "background-color:red". To apply multiple styles to the data grid, separate the CSS code with a semi-colon. For example, to display the background of the data grid in red with a solid border, in the **Style** box, type "background-color:red; borderstyle:solid".

Note: For more information about styles, see
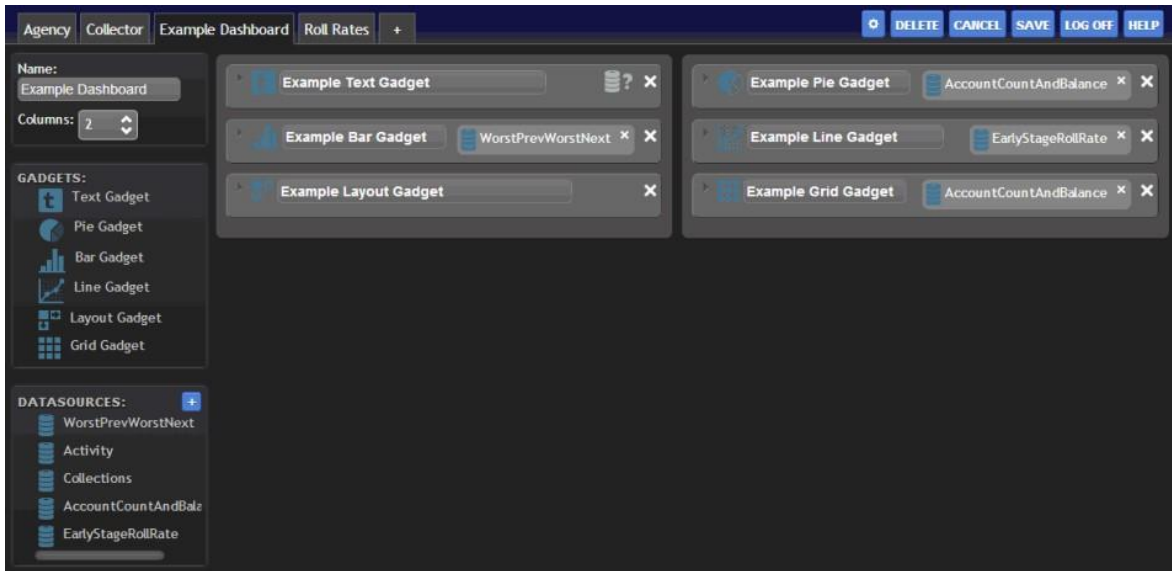http://www.cheatography.com/davechild/cheatsheets/css2/.

6. Complete the advanced options according to your preference and then **Save**.
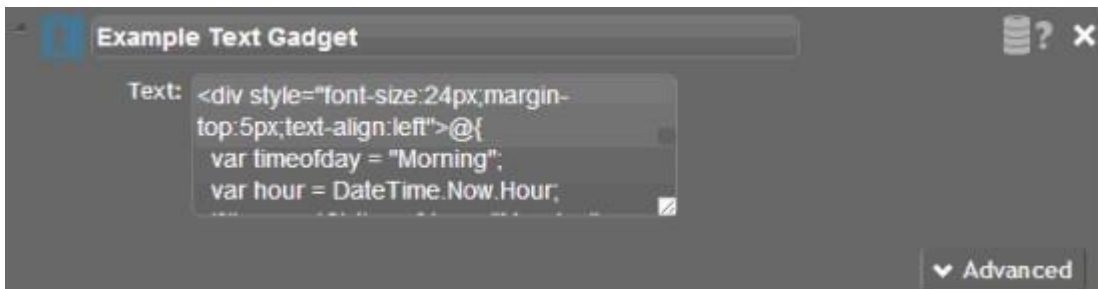
Modify a Text Gadget

You can modify a Text gadget once it's added to a dashboard. **To**

modify a Text gadget

1. In the toolbar, click the tab of the dashboard to open and then click **Edit**. The dashboard displays in edit mode.

2. Click the arrow next to the Text gadget title. The configuration options appear.

3. To change the title of the gadget, select the text in the gadget title box and then type a new title.

4. To modify the text, in the text box, type the text to display, or code to create the text to display.

5. To move the gadget to a different column of the dashboard, or to change its position within a column, drag and drop it to another column or position.

6. To modify advanced options, click **Advanced**, modify the information as necessary, and then click **Save**.

7. To delete the gadget from the dashboard, click the **X** in the upper right corner of the gadget.